Direct Secure Messaging Web 2.5.2

User Manual v1.0

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Orion Health Limited
PO Box 8273
Symonds Street
Auckland, New Zealand
Ph +64-9-638 0600
Fax +64-9-638 0699
info@orionhealth.com
www.orionhealth.com

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Orion Health Direct Secure Messaging Web 2.5

Orion Health™ Direct Secure Messaging Web (DSM Web) utilizes national standards to communicate health information between healthcare organizations, providers, and patients. DSM Web is an easy-to-use, secure communication method that replaces mail and fax transmissions between known parties, such as providers, laboratories, and public health departments. DSM Web benefits both patients and providers by improving the transport of health information, making it faster, easier, more secure, and less expensive.

DSM Web is a web-based secure mail solution within Orion Health™ Clinical Portal (Clinical Portal). It secures communications between providers participating in the HIE, as well as providers connected through any Healthcare Information Service Provider (HISP) who share a trust relationship with the HIE.

About the Product

Installation
• Security Essentials • System Requirements • Install Webmail • Post-Installation Configuration

Configuration
• Solution Overview • Configuring Direct Secure Messaging Web

Frequent Tasks
• Receiving New Messages • Replying to a Message • Composing a New Message • Working with Attachments • Deleting Messages

What's New
• About this Release

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User Manual

Revision Summary

Software Release	Document Version	Date	Release/Nature of Amendment
2.5	1.0	1/16/2014	January 2014 release.
2.5.1	1.0	3/17/2014	Direct Secure Messaging Web 2.5.1 Service Pack release, no changes to this document.
2.5.1	1.1	3/28/2014	Updated with additional details about forwarding and replying to messages.
2.5.2	1.0	5/12/2014	Direct Secure Messaging Web 2.5.2 Service Pack release, no changes to this document.

Refer to Printable Documents to download printable versions of the documentation.

Key Features

DSM Web enables the secure sending and receiving of emails between associates within an Orion Health, Inc. Direct Messaging System.

- The ability to easily send encrypted messages between Orion Health HISP subscribers and non-Orion Health subscribers (trusted HISPs – for example, HealthVault).
- Direct Message Portal (webmail).
- Standard webmail capabilities – including secure sending/receipt of messages and attachments, and viewing CDA attachments in the browser.
- Focus on Web Content Accessibility Guidelines (WCAG) 2.0 recommendations for making Web content more accessible.

Messages can only be sent to, and received by, associates who have access to the Direct Messaging application within your Orion Health HIE system.

Quick Guide

Learn more about...

- Navigating Direct Secure Messaging Web
- Replying to a Message
- Composing a New Message
- Working with Attachments
- Deleting Messages

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About this Manual

Typographical Conventions

The following typographical conventions are used throughout this manual and in the application's help screens.

Convention	Description
< >	Angle brackets identify variables that you must supply. Do not type the angle brackets.
[ ]	Square brackets represent an optional item. If an item is not marked with square brackets, it is required. Do not type the square brackets.
`monospace`	Monospace type indicates directory names, path names and file names.
bold	Boldface type indicates button names and menu commands.
	Note.
	Warning.
	Information.
	Tip.

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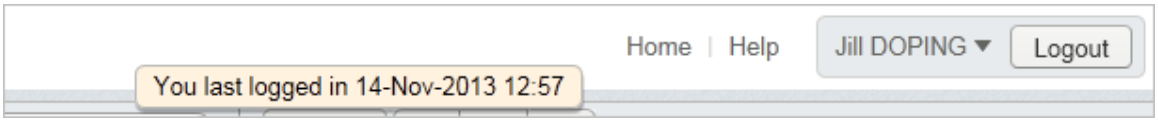
Navigating Direct Secure Messaging Web

Once you have logged into DSM Web, you may:

- Access incoming secure messages. Refer to Receiving New Messages for details.
- Use the **Global Menu** to access your home page and the help documentation. Refer to Navigating Using the Global Menu for details.
- Navigate DSM Web using your keyboard. Refer to Navigating DSM Web Using a Keyboard for details.

Navigating Using the Global Menu

The **Global Menu** is always accessible from any screen in DSM Web:



The following table describes each field on the **Global Menu** along with an explanation of the functionality provided:

Global Menu Item	Functionality
Last Logged In	Displays the date and time that you last logged in to Clinical Portal. This is a brief notification that only displays for a few seconds every time you log in.
Home	Displays your home page. This can be a default home page configured by your administrator or a home page you have selected from the **My Preferences** screen.
Help	Displays the online help screen that relates to the page you are viewing.
Logout	Select the **Logout** button to log out of DSM Web. This closes all windows and tabs.

Navigating DSM Web Using a Keyboard

DSM Web can be accessed using your keyboard.

DSM Web has been designed to work with screen readers, such as JAWS. All images within the user-facing documentation contain alt text.

To navigate between page elements, use the **Tab** key to move forwards, and **Shift + Tab** to move backwards.

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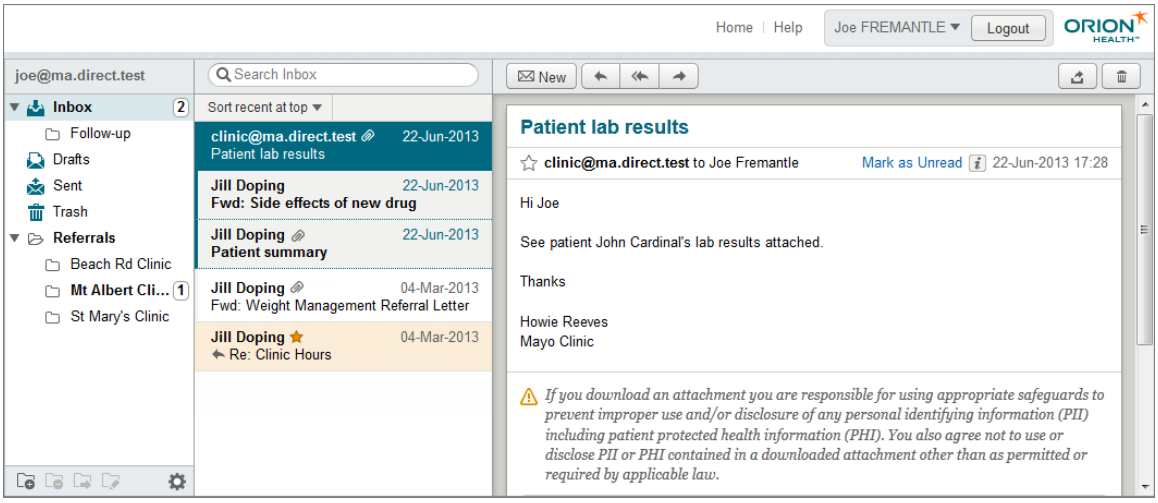
Navigating Between Folders

Folders enable you to manage your mailbox and organize messages so you can find them easily. When you first log in to DSM Web, the Inbox is shown by default. To view messages in other folders, select the folder in the list of folders.


Home | Help
Joe FREMANTLE
Logout
joe@ma.direct.test
Search Inbox
New
Inbox 2
Follow-up
Drafts
Sent
Trash
Referrals
Beach Rd Clinic
Mt Albert Cli... 1
St Mary's Clinic
Sort recent at top
clinic@ma.direct.test 22-Jun-2013
Patient lab results
Jill Doping 22-Jun-2013
Fwd: Side effects of new drug
Jill Doping 22-Jun-2013
Patient summary
Jill Doping 04-Mar-2013
Fwd: Weight Management Referral Letter
Jill Doping 04-Mar-2013
Re: Clinic Hours
Patient lab results
clinic@ma.direct.test to Joe Fremantle
Mark as Unread
22-Jun-2013 17:28
Hi Joe
See patient John Cardinal's lab results attached.
Thanks
Howie Reeves
Mayo Clinic
If you download an attachment you are responsible for using appropriate safeguards to prevent improper use and/or disclosure of any personal identifying information (PII) including patient protected health information (PHI). You also agree not to use or disclose PII or PHI contained in a downloaded attachment other than as permitted or required by applicable law.

Refer to Managing Folders for details.

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User Interface Conventions

The following list describes the user interface conventions for the messages in DSM Web.

- **Unread** messages are displayed in bold, against a light gray background, with a teal bar to the left.

- **Read** Messages have a white background and the subject of the message is displayed in normal text (that is, not bold).

- **Starred** messages have a light orange background with a **Star** icon next to the patient's name.

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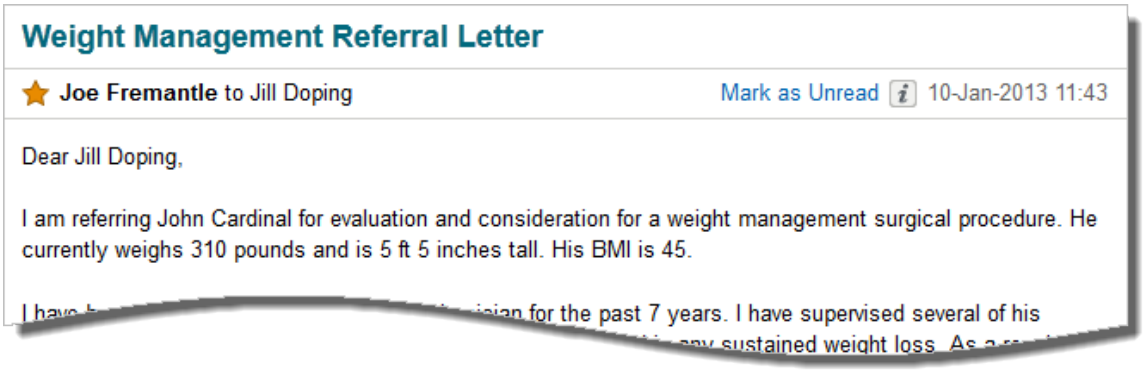
Flagging Messages for Follow-up

You can flag messages for follow-up by marking them with an orange star.

To flag a message:

1. Open the message to be starred.
2. Select the ☆ icon at the top left of the message. The icon changes to ★.


Weight Management Referral Letter
Joe Fremantle to Jill Doping
Mark as Unread
10-Jan-2013 11:43
Dear Jill Doping,
I am referring John Cardinal for evaluation and consideration for a weight management surgical procedure. He currently weighs 310 pounds and is 5 ft 5 inches tall. His BMI is 45.
for the past 7 years. I have supervised several of his

You can also sort the inbox for flagged messages.

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Shared Mailboxes

Instead of having access to a provider mailbox (for example, sarah.parker@direct.com), some users may have access to a Shared Mailbox (for example, diabetes.referrals@direct.com).

A Shared Mailbox is a group mailbox, which provides a single address for people to send messages to, and enables multiple people to manage incoming and outgoing mail for the group, for example, at a medical clinic or a nurse's station. All users who have access to the Shared Mailbox can view, send, and reply to messages - there are no additional fine-grained permissions for these mailboxes.

Users sending messages to a Shared Mailbox should be aware that all users who have access to the mailbox will be able to view the content of their message.

All activity performed in the shared mailbox is logged in the audit log under the specific user who performed the action.

Functionality within a Shared Mailbox

Most functionality works the same in a provider mailbox and a Shared Mailbox. The following table describes how some specific webmail features work in a Shared Mailbox:

When...	The...
a message is marked as read or unread	message is shown as read or unread for all users of the shared mailbox.
a message is flagged for follow-up (star icon)	message is shown as starred for all users of the shared mailbox.
mail rules for the shared mailbox are configured (on the **Settings** screen)	rules are applied for all incoming messages to the shared mailbox.
an out of office auto-reply is configured for the shared mailbox (on the **Settings** screen)	out of office auto-reply is applied for all incoming messages to the shared mailbox.

There is only one **Settings** screen for a mailbox, and all users that can access the shared mailbox can update and change the settings (email rules and the out of office auto-reply).

With concurrent access to a single mailbox, users of a shared mailbox should remember to refresh their inbox to ensure they are viewing up-to-date information, and may at times experience an error message if they are trying to perform an action at the same time as another user in the mailbox.

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Working with Messages

This section describes working with messages. Sending, receiving, and forwarding messages and attachments will make up the bulk of your work with DSM Web.

Quick Guide

Learn more about...

- Receiving New Messages
- Composing a New Message
- Forwarding a Message
- Replying to a Message
- Sent Messages
- Working with Draft Messages
- Working with Attachments
- Deleting Messages
- Searching for a Message

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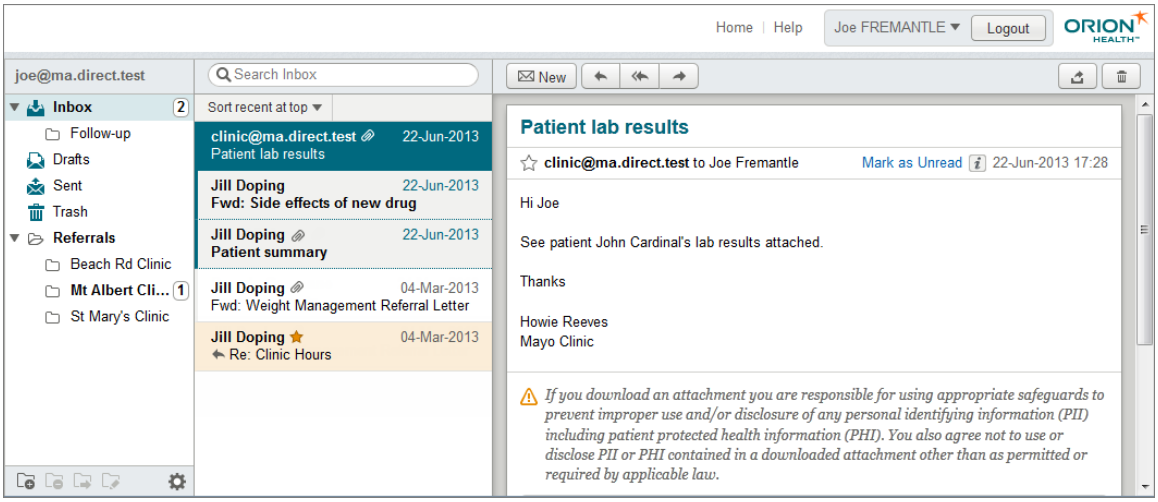
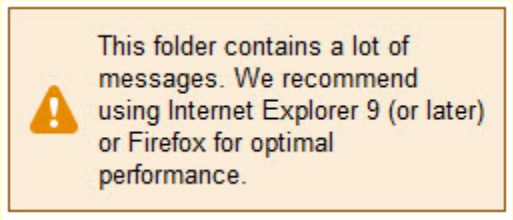
Receiving New Messages

Incoming messages are displayed in the Inbox, or, if you have message rules defined, are automatically filtered into message folders according to the message rule.

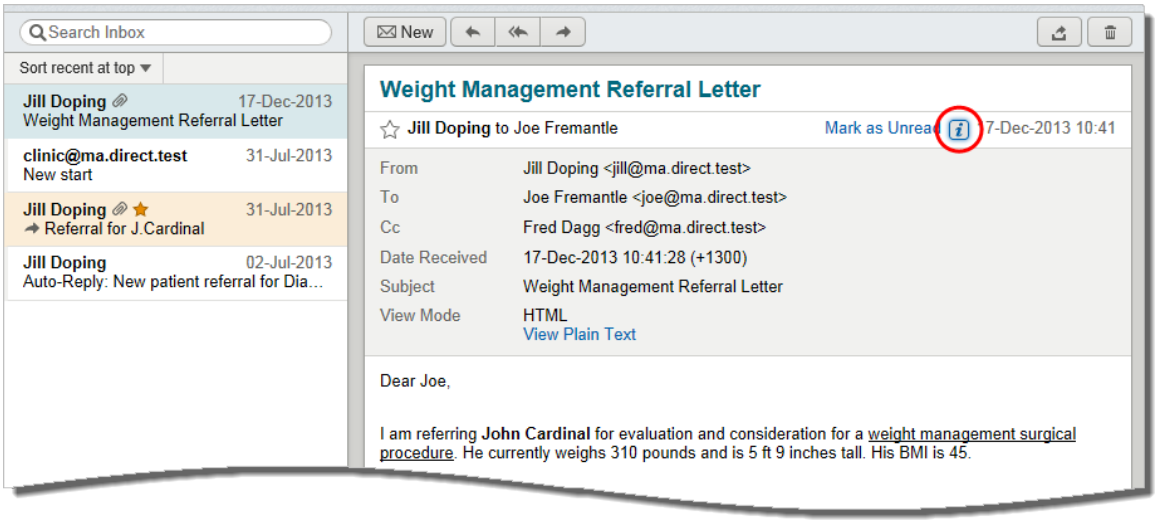
When you first log in to DSM Web, the inbox is shown by default. To view messages in other folders, select the folder in the list of folders.


Home | Help
Joe FREMANTLE
Logout
joe@ma.direct.test
Search Inbox
New
Inbox 2
Follow-up
Drafts
Sent
Trash
Referrals
Beach Rd Clinic
Mt Albert Cli... 1
St Mary's Clinic
Sort recent at top
clinic@ma.direct.test 22-Jun-2013
Patient lab results
Jill Doping 22-Jun-2013
Fwd: Side effects of new drug
Jill Doping 22-Jun-2013
Patient summary
Jill Doping 04-Mar-2013
Fwd: Weight Management Referral Letter
Jill Doping 04-Mar-2013
Re: Clinic Hours
Patient lab results
clinic@ma.direct.test to Joe Fremantle
Mark as Unread 22-Jun-2013 17:28
Hi Joe
See patient John Cardinal's lab results attached.
Thanks
Howie Reeves
Mayo Clinic
If you download an attachment you are responsible for using appropriate safeguards to prevent improper use and/or disclosure of any personal identifying information (PII) including patient protected health information (PHI). You also agree not to use or disclose PII or PHI contained in a downloaded attachment other than as permitted or required by applicable law.

If you are using *Internet Explorer 8* and you have many messages in your Inbox, it will take a long time to load and display an error message. For optimal performance, it is recommended that you use Firefox or *Internet Explorer 9* and later to view your Inbox.


This folder contains a lot of messages. We recommend using Internet Explorer 9 (or later) or Firefox for optimal performance.

To expand the message details panel, select the **Message Details** icon.


Search Inbox
New
Sort recent at top
Jill Doping 17-Dec-2013
Weight Management Referral Letter
clinic@ma.direct.test 31-Jul-2013
New start
Jill Doping 31-Jul-2013
Referral for J.Cardinal
Jill Doping 02-Jul-2013
Auto-Reply: New patient referral for Dia...
Weight Management Referral Letter
Jill Doping to Joe Fremantle
Mark as Unread
7-Dec-2013 10:41
From Jill Doping <jill@ma.direct.test>
To Joe Fremantle <joe@ma.direct.test>
Cc Fred Dagg <fred@ma.direct.test>
Date Received 17-Dec-2013 10:41:28 (+1300)
Subject Weight Management Referral Letter
View Mode HTML
View Plain Text
Dear Joe,
I am referring John Cardinal for evaluation and consideration for a weight management surgical procedure. He currently weighs 310 pounds and is 5 ft 9 inches tall. His BMI is 45.

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The following table displays the name of each field on the message details panel, along with an explanation of each field:

Field	Description
From	The sender's name and email address.
To	The recipient's name and email address.
CC	The recipient's name and email address to whom a "carbon copy" of the message was sent.
Date Received	The date and time when the message was received by the recipient.
Subject	The text displayed for the message in the recipient's inbox.
View Mode	Indicates whether the displayed message content is HTML or Plain Text. If the message contains both HTML and Plain Text, the message content is shown in HTML by default. A link is displayed which enables you to switch the message content between HTML and Plain Text.

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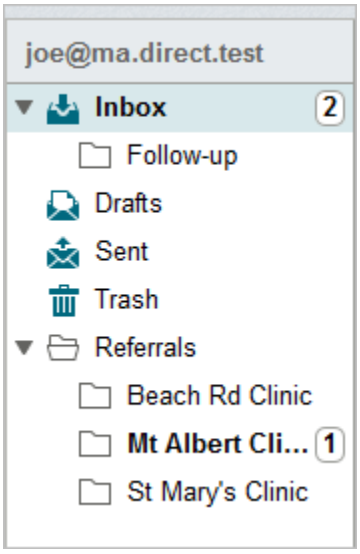
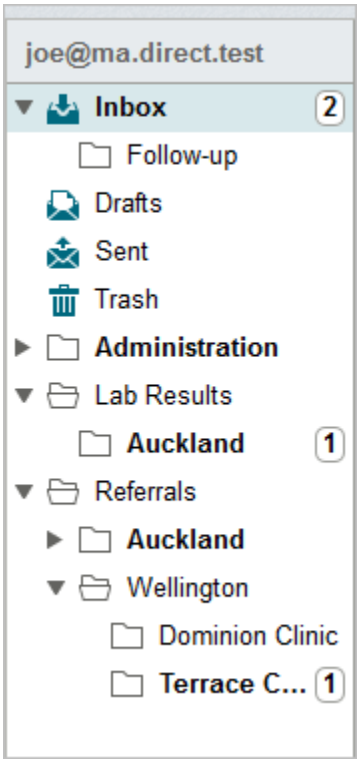
Unread Messages

When you have new (unread) messages in a folder, DSM Web displays the folder in bold. The number of new (unread) messages are shown to the right of the name, as shown in the following screenshot.



When a new (unread) message is delivered to a hidden subfolder, DSM Web displays the lowest visible parent folder in bold. The number of new (unread) messages in a hidden subfolder is not visible until the parent folder has been expanded to reveal the subfolder, as shown in the following screenshot.



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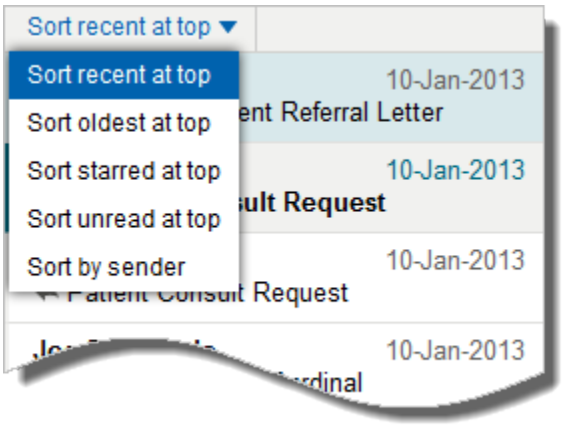
Sorting Messages

By default, messages display in descending date order. You can change the sort order of your messages by selecting the **Sort** option, as shown in the following screenshot:



The following table lists the sort options that you can choose from, along with an explanation of the functionality of each sort option:

Sort Option	Description
Sort recent at top	Select this option to view the latest message at the top of the list.
Sort oldest at top	Select this option to view the oldest message at the top of the list.
Sort starred at top	Select this option to view all starred messages at the top of the list.
Sort unread at top	Select this option to view all unread messages at the top of the list.
Sort by sender	Select this option to view all messages in alphabetical order according to the sender's first name.

Learn more about:

- Composing a New Message
- Replying to a Message
- Forwarding a Message
- Working with Attachments
- Viewing Sent Messages
- Deleting Messages

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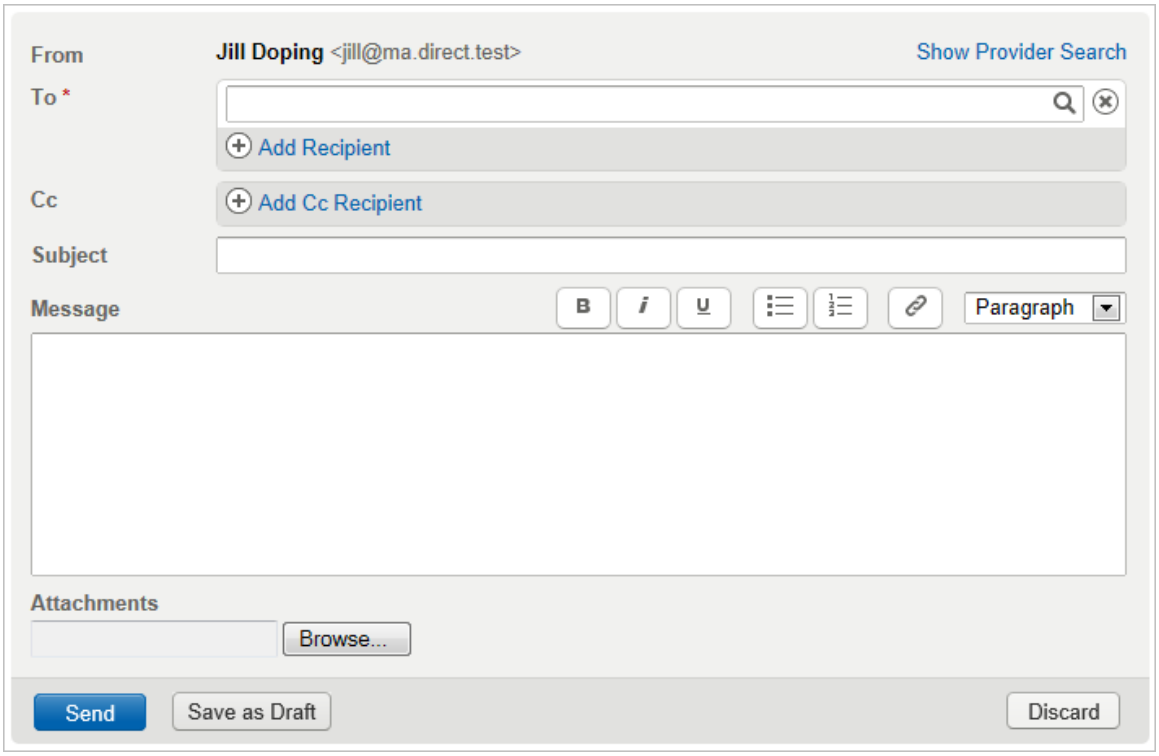
Composing a New Message

To compose a new message:

1. Select the **New** button. The **New Message** screen displays in a new tab:



2. Complete the fields on the screen. Mandatory fields are marked with an asterisk (*). The following table displays the name of each field on the **New Message** screen, along with an explanation of each field.

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Field	Description
To	Enter the recipient's email address. The email addresses of providers from the Provider Directory will already be loaded into the system. Start typing their name, and the auto-complete functionality will provide a drop-down list with matches. Select the recipient's name from the list. If you have contact groups defined, the contact groups will be displayed at the end of the auto-complete list. There is a limit of 15 email addresses and contact groups in the auto-complete list. Therefore, if the address or contact group you are looking for is not displayed in the auto-complete list, type more letters to reduce the matches. Alternatively, you can search for a provider using the **Provider Search** . Refer to Searching for a Provider for details. You may enter more than one recipient. Select the **Add Recipient** link to add another email address.
CC	To send a "carbon copy" of the message to another user, select the **Add Cc Recipient** button and start typing the recipient's name. The auto-complete functionality will provide a drop-down list with matches. Select the recipient's name from the list.
Subject	Type the text you want to be displayed for this message in the recipient's inbox.
Message	Type your message. You can customize the font style and insert links using the rich-text formatting buttons. Refer to Rich-Text Formatting for details.

If you attempt to send a message without a **Subject** or any text in the message body, you will be asked to confirm this before the message will send.

3. Add an attachment, if desired. To do so, select the **Browse** button, and select your file from your library. Refer to Working with Attachments for details.
4. Select the **Send** button to send the message, or the **Discard** button to discard your draft.

Once a message has been sent it cannot be recalled. A copy of the message will be stored in your **Sent** folder.

A message displays, confirming the message has been sent.

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If an email fails to send, a Delivery Failure Notification message will be delivered to the sender. Depending on what caused the sending to fail, the delivery failure notification message may take an hour or more to arrive. Therefore, it is recommended that urgent messages are followed up in person.

Refer to Message Disposition Notifications (Delivery Receipts) for details about Delivery Failure Notifications.

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Rich-Text Formatting

Text Formatting

When composing a new message, you can format the text by selecting the buttons above the **Message** field. The functions are described in the table below:

Feature	Icon	Description
Bold		Bold all or some of your message.
Italic		Italicize all or some of your message.
Underline		Underline all or some of your message.
Bulleted list		Create a bulleted list in your message.
Numbered list		Create a numbered list in your message.
Insert link		Hyperlink the selected text.

Paragraph Formatting

To change the paragraph format style, select the option from the drop-down list above the **Message** field. The paragraph format styles are described in the table below:

Feature	Description
Paragraph	Applies the Paragraph style in the text.
Heading 1	Applies the Heading 1 style in the text.
Heading 2	Applies the Heading 2 style in the text.

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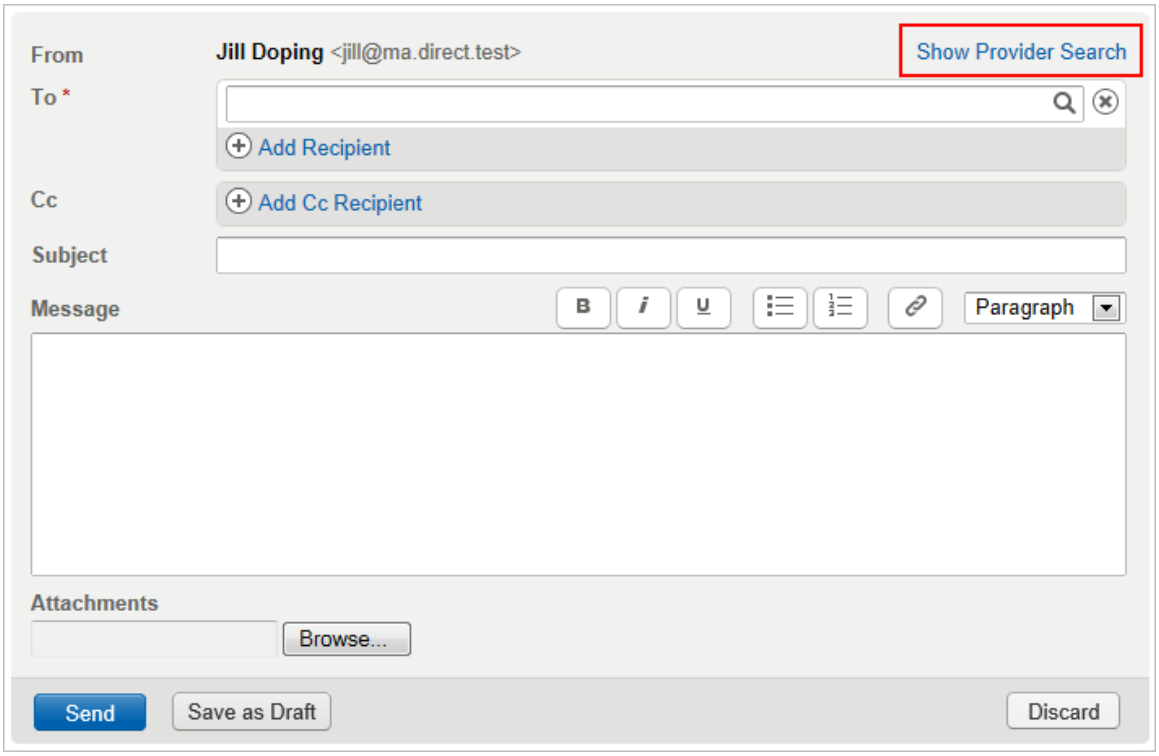
Searching for a Provider

The **Provider Search** enables you to search for healthcare workers when composing a new message, when forwarding a message, or when replying to a message.

> This feature must be configured by the DSM administrator before it is available to users.

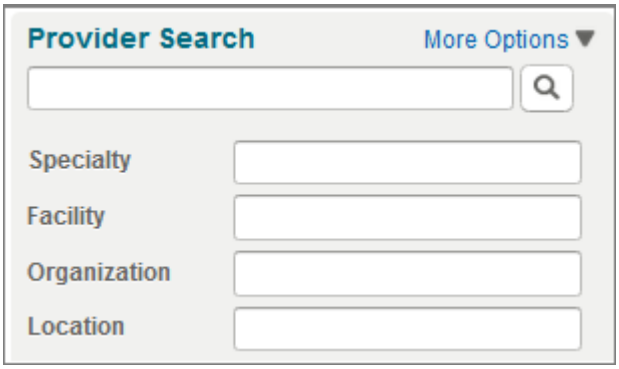
To search for a provider:

1. From the **Message** screen, select the **Show Provider Search** link.



2. The **Provider Search** screen is shown to the right of the message screen.

   This enables you to enter a keyword to search for the provider.
3. Enter the details of the provider you want to search for and then select the **Search** icon.
4. If you want to add additional search options, select the **More Options** link.



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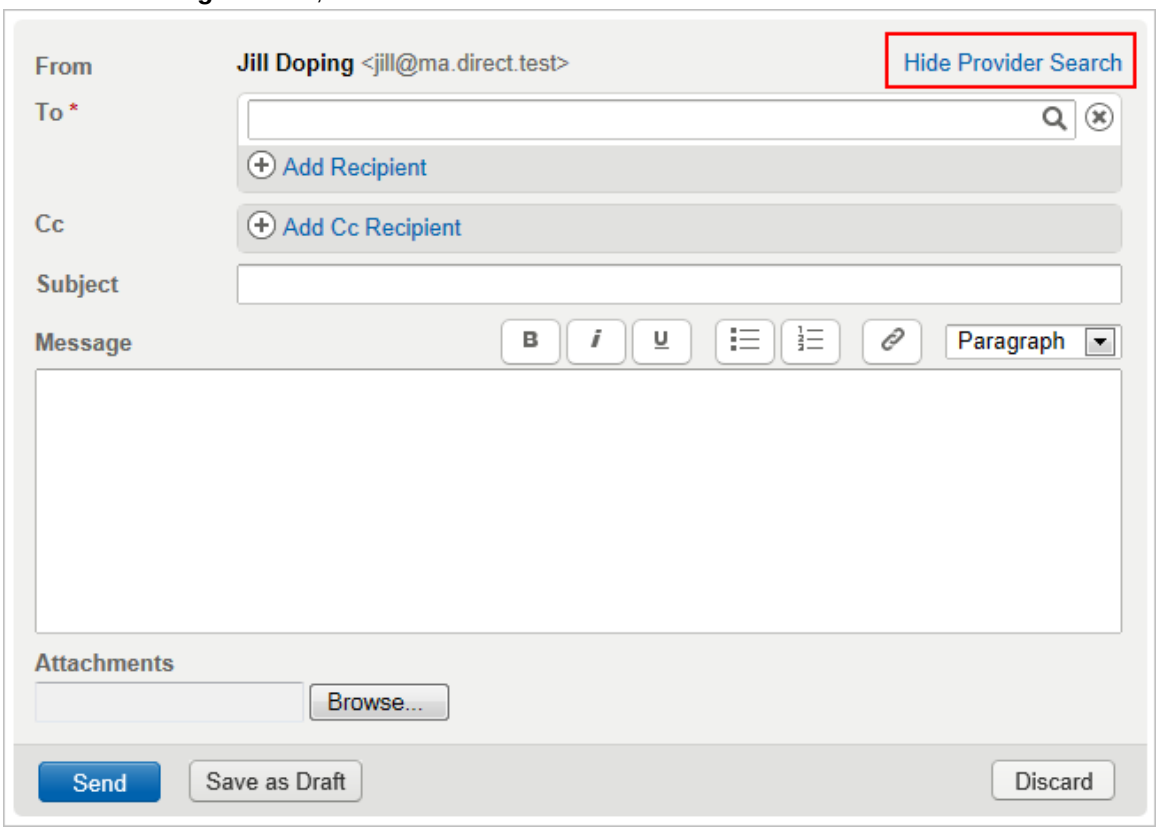
This enables you to search for a provider by:

- Specialty
- Facility
- Organization
- Location

5. Enter the name and any additional search criteria to search for the provider and then select the **Search** icon. Any providers that match the search criteria are then displayed.
6. To select a provider:
   - Select the **To** link to add the selected provider to the **To** recipient list.
   - Select the **Cc** link to add the selected provider to the **Cc** recipient list.

To hide the **Provider Search** screen:

1. From the **Message** screen, select the **Hide Provider Search** link.



The **Provider Search** screen is then hidden.

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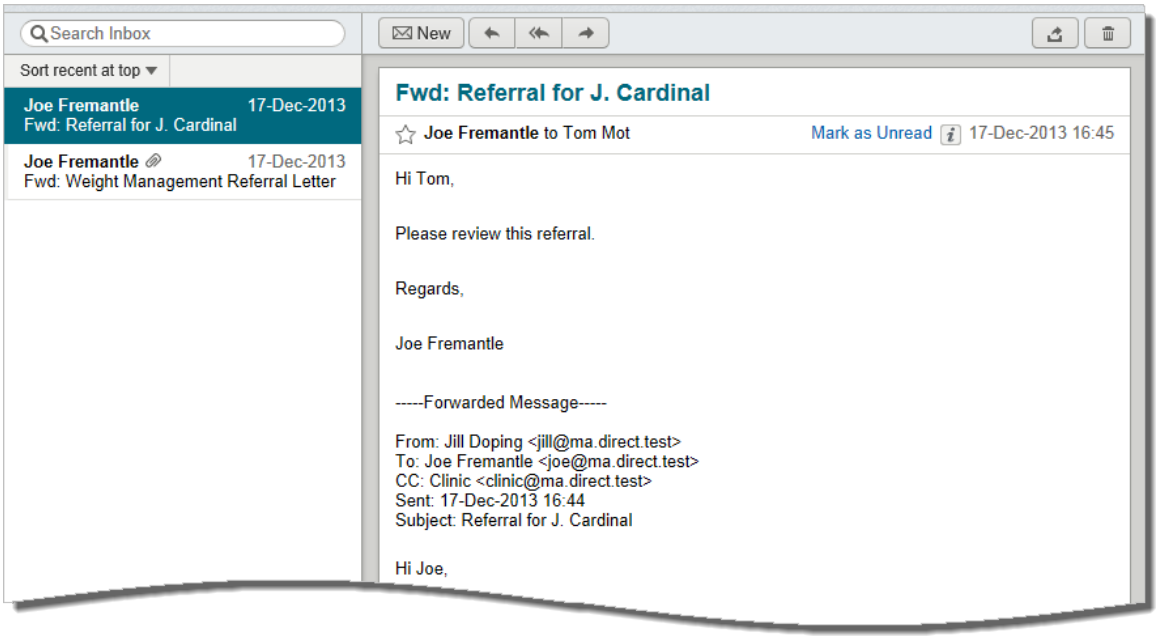
Forwarding a Message

You may send a copy of a message to a new recipient or recipients by using the **Forward** button.

To forward a message:

1. Select a message to open it. The message displays in the right pane.
2. Select the **Forward** button. The **Forward Message** screen opens, containing all the information included in the original email, excluding the original recipients of the message. The copy of the original message will be automatically inserted as plain text.
3. Enter a new recipient, or recipients, in the **To** field.
4. Write your email as described in Composing a New Message. All attachments in the original message will be included in the forwarded message by default. You may remove these attachments, or add new ones. Refer to Working with Attachments for details.
5. Select the **Send** button to send the message, or the **Discard** button to discard your draft. The forwarded message will remain in your inbox and will display **Fwd:** or the **Forward** icon, as shown in the following screenshot:



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Replying to a Message

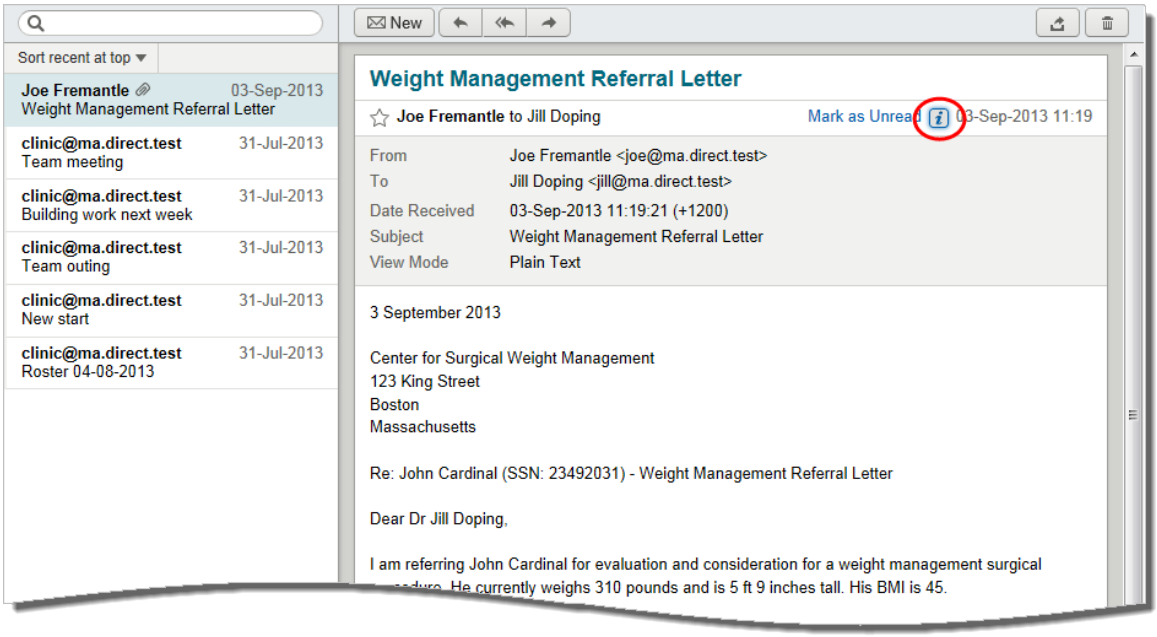
To read and reply to a message:

1. Select a message to open it. The message displays in the right pane.

   > Incoming HTML messages are sanitized to remove potentially malicious content. This means that some details, such as images, links, and certain styles, may not display.

   A message will be marked as read 3 seconds after you have selected it. You may mark the message as **Unread** again by selecting the **Mark as Unread** link in the header of the open message.

2. To display message details, such as, who the message is from, the subject of the message, and the date the message was sent, select the **Message Details** icon.



   > When the message details panel is expanded, the timezone is displayed next to the date and time that the message was received. This timezone is taken from the computer's operating system of the logged-in user.

3. Select the **Reply** button to reply to the sender of the message, or the **Reply All** button to reply to all recipients included in the original email. The **Reply** screen opens in a new window:

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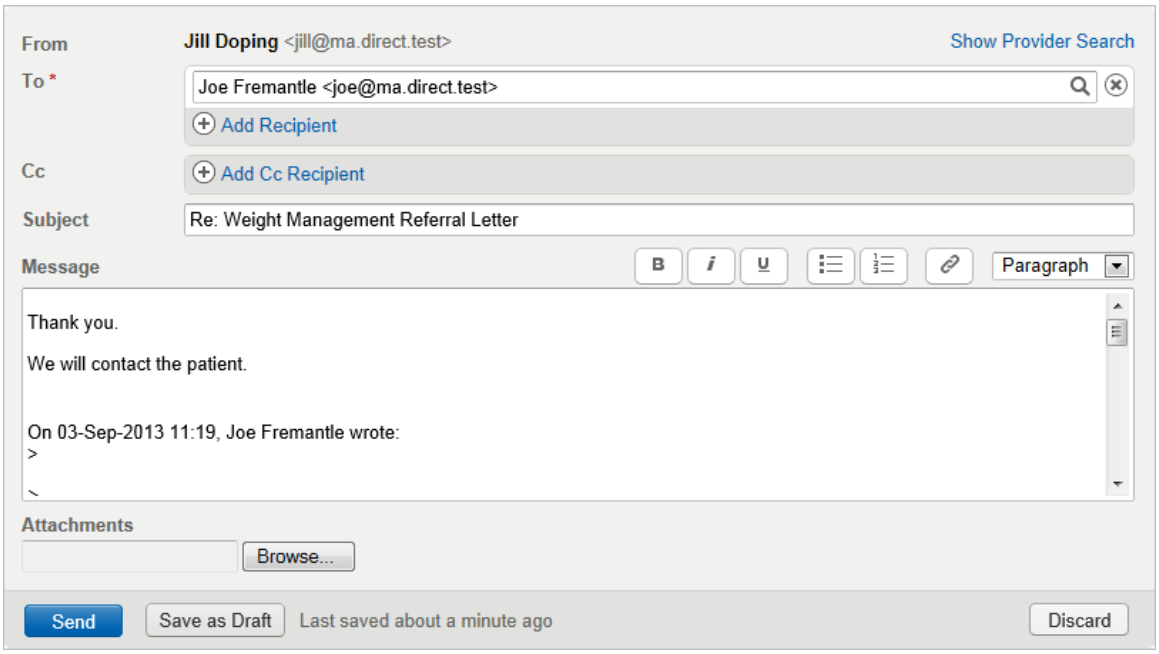

The copy of the original message will be automatically inserted as plain text.

Enter your reply. Refer to Composing a New Message for details on sending messages.

4. Select the **Send** button to send your message, or the **Discard** button to delete your draft. A confirmation message displays when your message is successfully sent. The replied to message will remain in your inbox. It will display **Re:** or the **Replied** icon .

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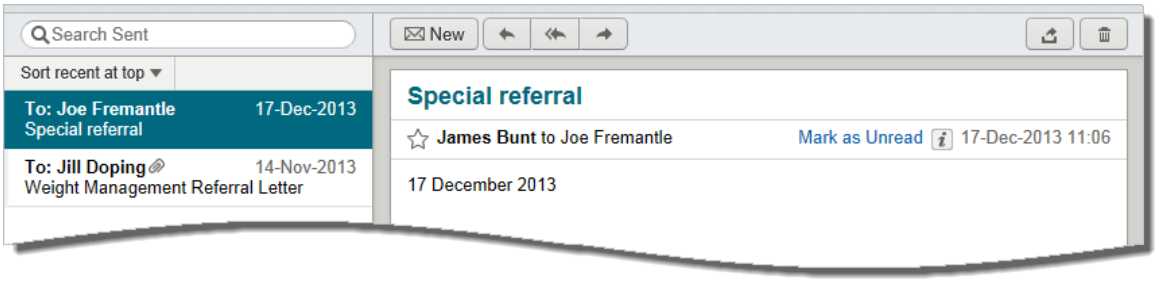
Sent Messages

The **Sent Messages** folder contains copies of all messages you have sent.

To view sent messages, navigate to your **Sent** folder by selecting **Direct Secure Messaging > Sent**. A list of sent messages displays:



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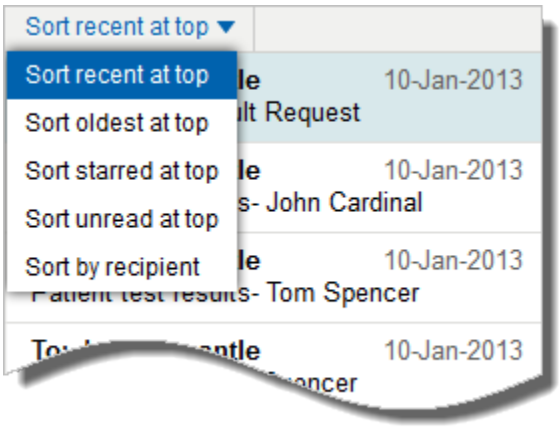
Sorting Sent Messages

By default, messages display in descending date order. You can change the sort order of your messages by selecting the **Sort** option as shown in the following screenshot:



The following table lists the sort options that you can choose from, along with an explanation of the functionality of each sort option:

Sort Option	Description
Sort recent at top	Select this option to view the latest message at the top of the list.
Sort oldest at top	Select this option to view the oldest message at the top of the list.
Sort starred at top	Select this option to view all starred messages at the top of the list.
Sort unread at top	Select this option to view all unread messages at the top of the list.
Sort by recipient	Select this option to view all messages in alphabetical order according to the recipient's first name.

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Working with Sent Messages

Even though a message has been sent, you may still work with it. You may:

- Reply to the message by selecting the **Reply** button, or reply to all recipients by selecting the **Reply All** button.
- Forward the message to a new recipient by selecting the **Forward** button.
- Mark the message as unread by selecting the **Mark as Unread** link.
- Mark the message as important by selecting the star icon. Refer to Starring Messages for details.
- View more information about the message by selecting the **Message Details** icon .
- Delete the message by selecting the **Delete** button.

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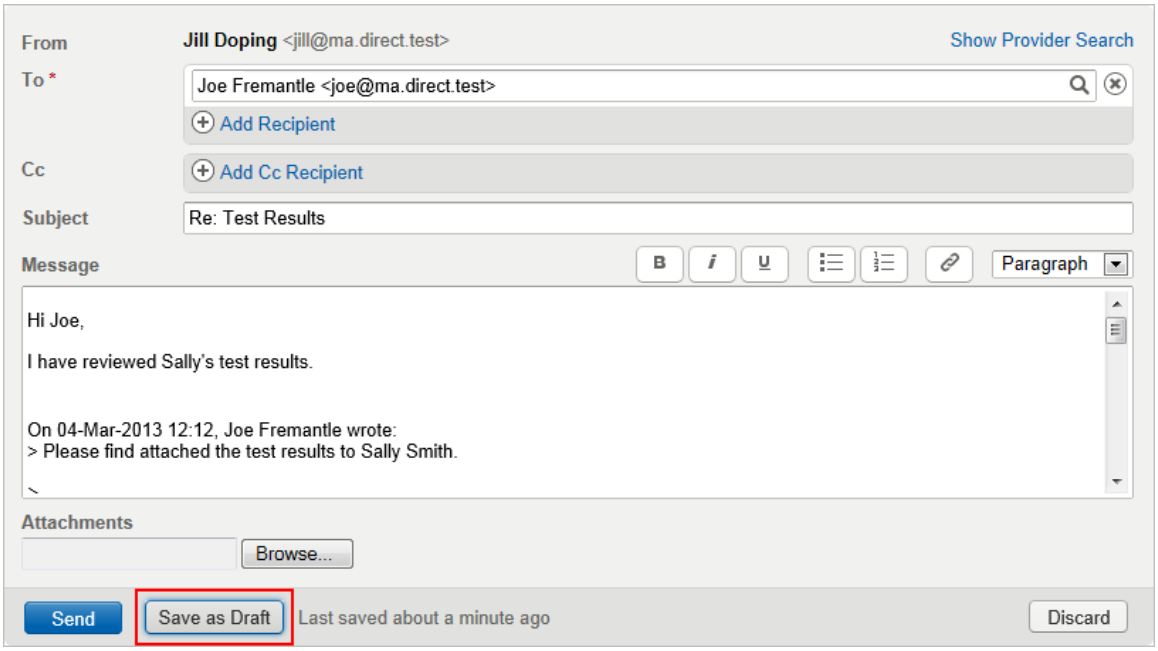
Working with Draft Messages

Draft messages are messages which have been composed, but have not been sent. Any type of message can be saved as a draft, whether it is a New, Forward, Reply, or Reply All message.

Saving a message as a draft allows you to compose some of the message, save it as a draft, and then continue editing the message at another time. You can edit and save a message as a draft multiple times. Draft messages are auto-saved every 2 minutes and a draft message that is a Forward, Reply, or Reply All message is auto-saved instantly. You can also manually save a message as a draft by selecting the **Save as Draft** button, as shown in the following screenshot:



The message is then sent to your **Drafts** folder. The draft message screen will remain open, to allow you to continue adding to the message. If you close the draft message screen, you can access it again by navigating to your **Drafts** folder.

To continue editing a draft message that has been closed:

1. Navigate to your **Drafts** folder by selecting **Direct Secure Messaging > Drafts**.
2. Select the desired draft message.
3. Select the **Continue Editing** button or the **Continue Editing** link in the body of the message, as shown in the following screenshot:

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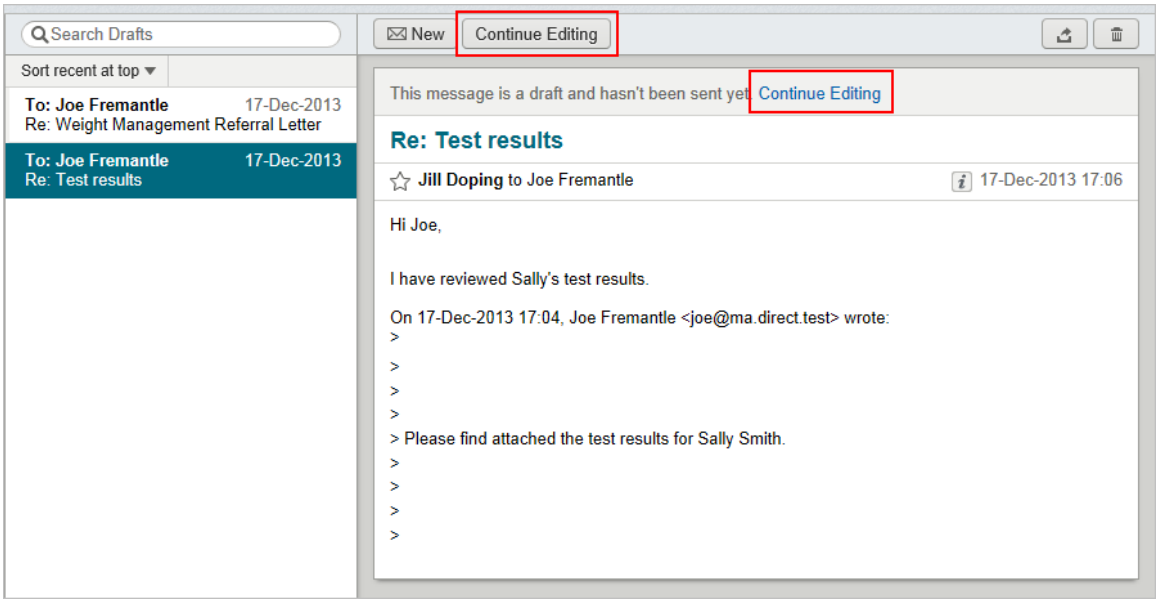
Search Drafts
New
Continue Editing
Sort recent at top
To: Joe Fremantle 17-Dec-2013
Re: Weight Management Referral Letter
To: Joe Fremantle 17-Dec-2013
Re: Test results
This message is a draft and hasn't been sent yet Continue Editing
Re: Test results
Jill Doping to Joe Fremantle
17-Dec-2013 17:06
Hi Joe,
I have reviewed Sally's test results.
On 17-Dec-2013 17:04, Joe Fremantle <joe@ma.direct.test> wrote:
> Please find attached the test results for Sally Smith.

Refer to Composing a New Message for details on how to send your draft message when you have completed editing it.

You can delete a draft message by selecting the **Discard** button. This will permanently delete the draft message and you will not be able to access the deleted message from the **Trash** folder.

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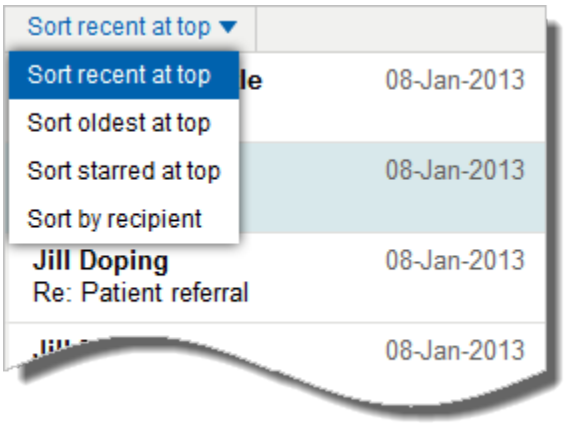
Sorting Draft Messages

By default, messages display in descending date order. You can change the sort order of your messages by selecting the **Sort** option, as shown in the following screenshot:



The following table lists the sort options that you can choose from, along with an explanation of the functionality of each sort option:

Sort Option	Description
Sort recent at top	Select this option to view the latest message at the top of the list.
Sort oldest at top	Select this option to view the oldest message at the top of the list.
Sort starred at top	Select this option to view all starred messages at the top of the list.
Sort by recipient	Select this option to view all messages in alphabetical order according to the recipient's first name.

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Working with Attachments

Attachments are files which are attached to an email. For example, an image or a document may be sent as an attachment.

Attachments are uploaded from, downloaded to, and stored on local computers. If you download an attachment you are responsible for using appropriate safeguards to prevent improper use and/or disclosure of any personal identifying information (PII) including patient protected health information (PHI). You also agree not to use or disclose PII or PHI contained in a downloaded attachment other than as permitted or required by applicable law.

- Adding an Attachment to a Message
- Downloading an Attachment from a Message
- Forwarding a Message with an Attachment

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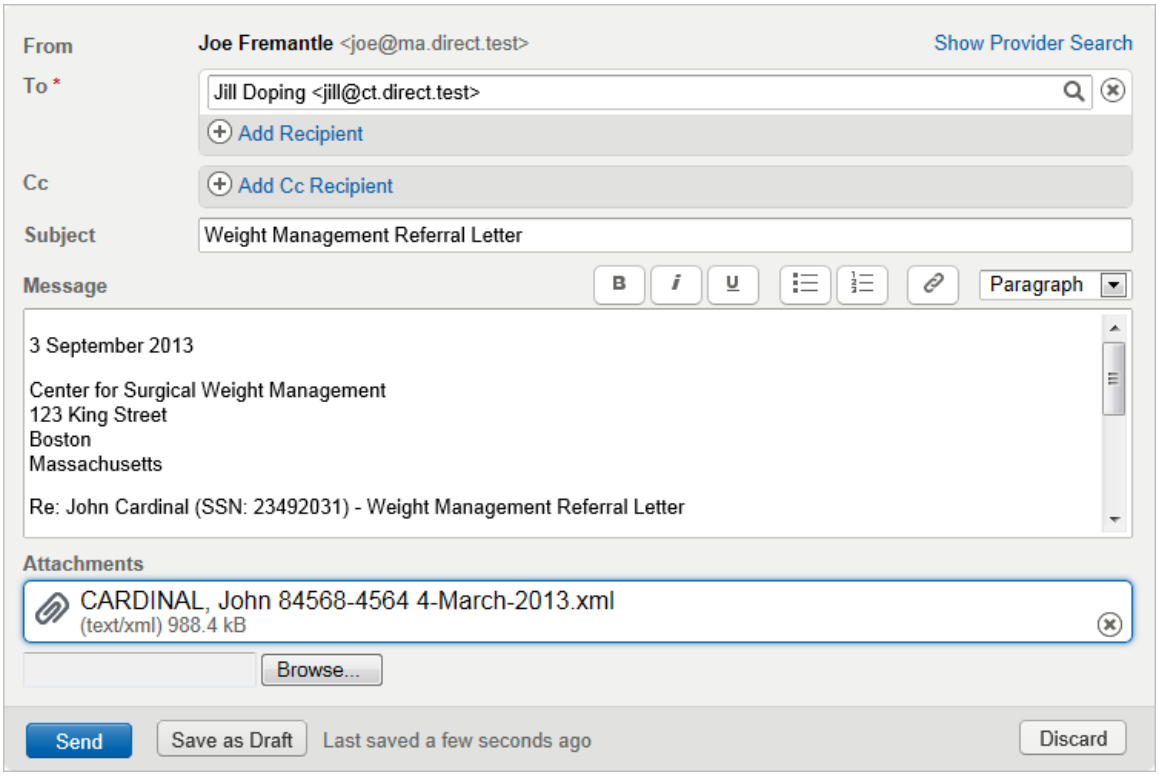
Adding an Attachment to a Message

To add an attachment:

1. Navigate to **Direct Secure Messaging** and select the **New** button. The **New Message** screen opens in a new window.
2. Enter the message, as described in Composing a New Message.
3. Select the **Attachments** field, then select **Browse** to search your library for a document or image. The uploaded file is displayed in the **Attachments** panel:



If your attachment size exceeds the maximum configured size limit (for example, 10MB), an error message will display and you will not be able to send the attachment. If you are sending multiple attachments and the total size of all attachments exceeds the maximum allowed, an error message will display and the **Send** and **Save as Draft** buttons will be disabled. You can remove attachments by selecting the **Remove** icon until the total attachment size is under the limit.

> When using Mozilla® Firefox® and Safari®, the attachment size is checked before the file is uploaded to the server. For Internet Explorer 8 and 9, DSM Web will attempt to upload the file to the server before displaying an error message if the maximum configured size limit has been reached.

4. Select the **Send** button to send the message.

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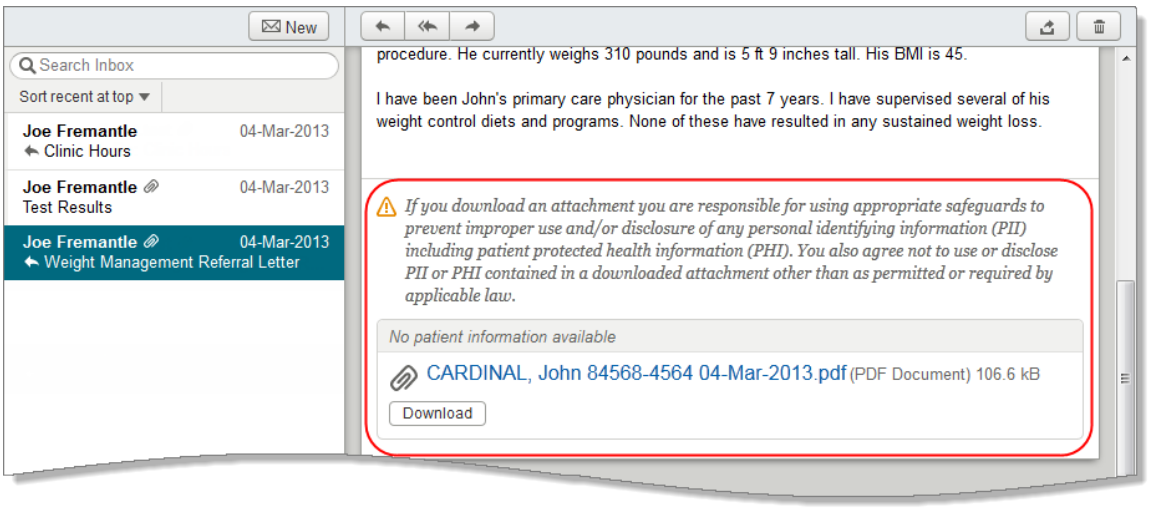
Downloading an Attachment from a Message

When you receive a message with an attachment, the **Attachment** icon is displayed next to the message, as shown in the following screenshot:

To open the attachment:

1. Navigate to **Messaging > Inbox** and select the message containing the attachment. Note the disclaimer on the screen which informs you that you are responsible for securing the personal health information contained in the attachment. Patient information associated with a CCD or CDA attachment will be displayed in the header of the attachment, as shown in the following screenshot:


New
Search Inbox
Sort recent at top
Joe Fremantle 04-Mar-2013
Clinic Hours
Joe Fremantle 04-Mar-2013
Test Results
Joe Fremantle 04-Mar-2013
Weight Management Referral Letter
procedure. He currently weighs 310 pounds and is 5 ft 9 inches tall. His BMI is 45.
I have been John's primary care physician for the past 7 years. I have supervised several of his weight control diets and programs. None of these have resulted in any sustained weight loss.
If you download an attachment you are responsible for using appropriate safeguards to prevent improper use and/or disclosure of any personal identifying information (PII) including patient protected health information (PHI). You also agree not to use or disclose PII or PHI contained in a downloaded attachment other than as permitted or required by applicable law.
No patient information available
CARDINAL, John 84568-4564 04-Mar-2013.pdf (PDF Document) 106.6 kB
Download

   Patient demographics will not be displayed with any other attachment types except CCD or CDA.
2. If the attachment name displays as a link, you can select the attachment name to open the attachment within the body of the message, as shown in the following screenshot:

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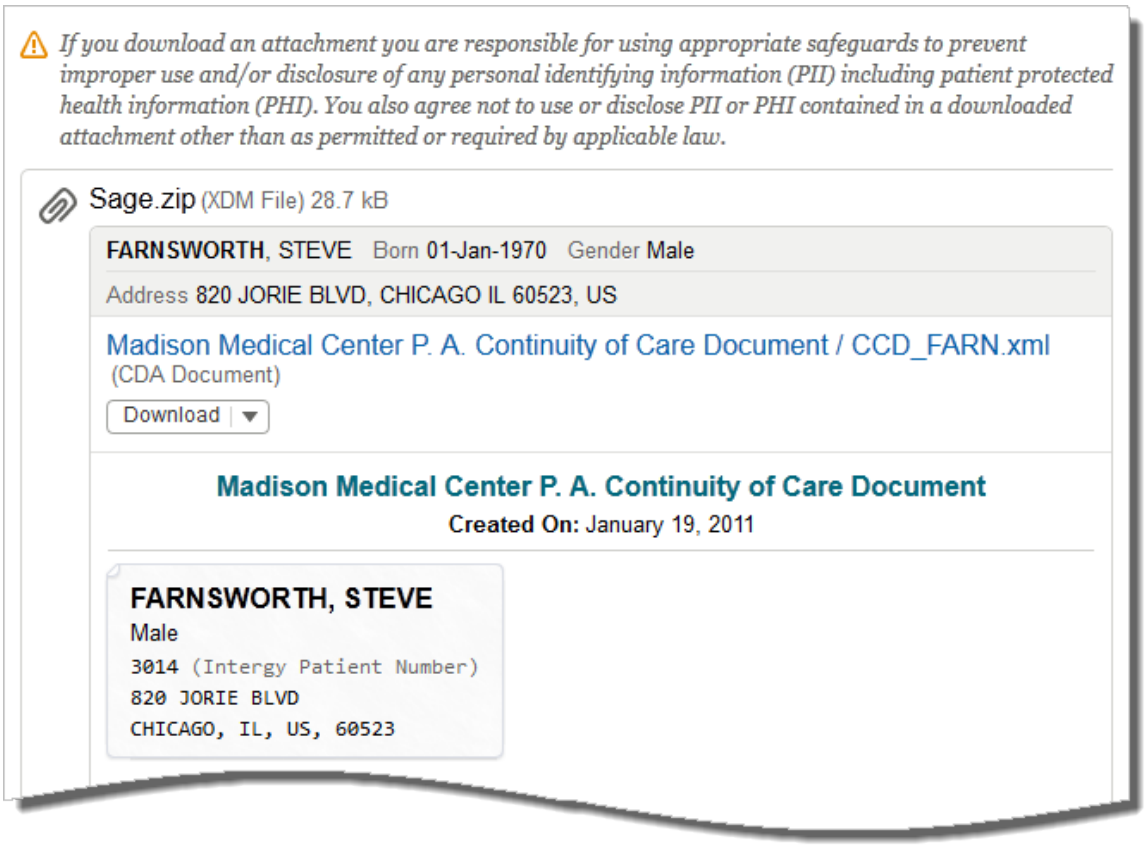
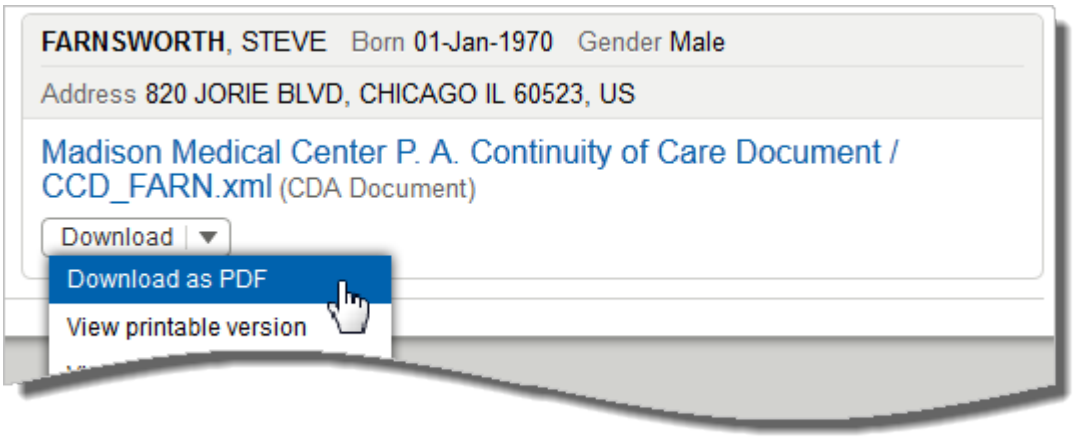

If you download an attachment you are responsible for using appropriate safeguards to prevent improper use and/or disclosure of any personal identifying information (PII) including patient protected health information (PHI). You also agree not to use or disclose PII or PHI contained in a downloaded attachment other than as permitted or required by applicable law.
Sage.zip (XDM File) 28.7 kB
FARNSWORTH, STEVE Born 01-Jan-1970 Gender Male
Address 820 JORIE BLVD, CHICAGO IL 60523, US
Madison Medical Center P. A. Continuity of Care Document / CCD_FARN.xml
(CDA Document)
Download
Madison Medical Center P. A. Continuity of Care Document
Created On: January 19, 2011
FARNSWORTH, STEVE
Male
3014 (Intergy Patient Number)
820 JORIE BLVD
CHICAGO, IL, US, 60523

If the attachment name is not a link, you will not be able to view the document within the message.

3. Select the **Download** button to download the attachment. You will be prompted to open or save the attachment.

> Attachments may be vulnerable to viruses. Only open attachments from sources you trust.

4. If the **Download** button displays a drop-down list, as shown in the following screenshot, you can select a download option.


FARNSWORTH, STEVE Born 01-Jan-1970 Gender Male
Address 820 JORIE BLVD, CHICAGO IL 60523, US
Madison Medical Center P. A. Continuity of Care Document / CCD_FARN.xml (CDA Document)
Download
Download as PDF
View printable version

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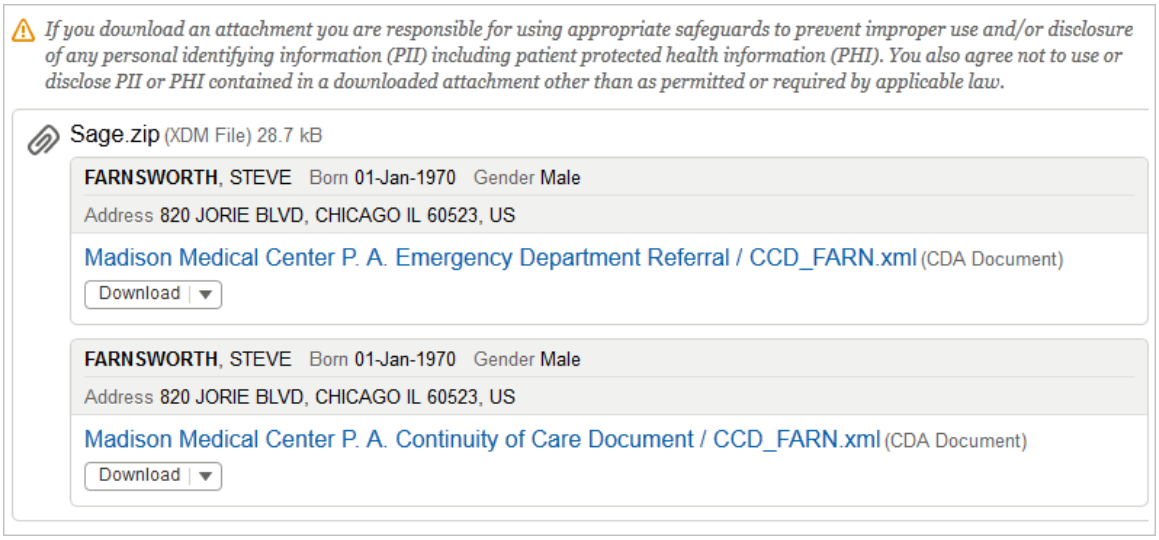
The following table describes the download options that are displayed, along with an explanation of the functionality of each option:

Download Option	Description
Download as PDF	Select this option to download the attachment as a PDF.
View printable version	Select this option to view what the attachment will look like when it is printed. The printable version will display in the body of the message with a **Print** button so you can print the attachment without downloading it. This functionality is only applicable to CCD, CDA, and PDF attachments.

5. If the message contains an XDM file, each attachment will display separately under the main attachment name, as shown in the following screenshot:


If you download an attachment you are responsible for using appropriate safeguards to prevent improper use and/or disclosure of any personal identifying information (PII) including patient protected health information (PHI). You also agree not to use or disclose PII or PHI contained in a downloaded attachment other than as permitted or required by applicable law.
Sage.zip (XDM File) 28.7 kB
FARNSWORTH, STEVE Born 01-Jan-1970 Gender Male
Address 820 JORIE BLVD, CHICAGO IL 60523, US
Madison Medical Center P. A. Emergency Department Referral / CCD_FARN.xml (CDA Document)
Download
FARNSWORTH, STEVE Born 01-Jan-1970 Gender Male
Address 820 JORIE BLVD, CHICAGO IL 60523, US
Madison Medical Center P. A. Continuity of Care Document / CCD_FARN.xml (CDA Document)
Download

You can work with each attachment as per normal.

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Forwarding a Message with an Attachment

Messages containing attachments may be forwarded to another user, as described in Forwarding a Message. Attachments may be removed from messages to be forwarded, or more attachments may be added.

> Attachments are scanned for viruses when they are uploaded, but not when they are forwarded.

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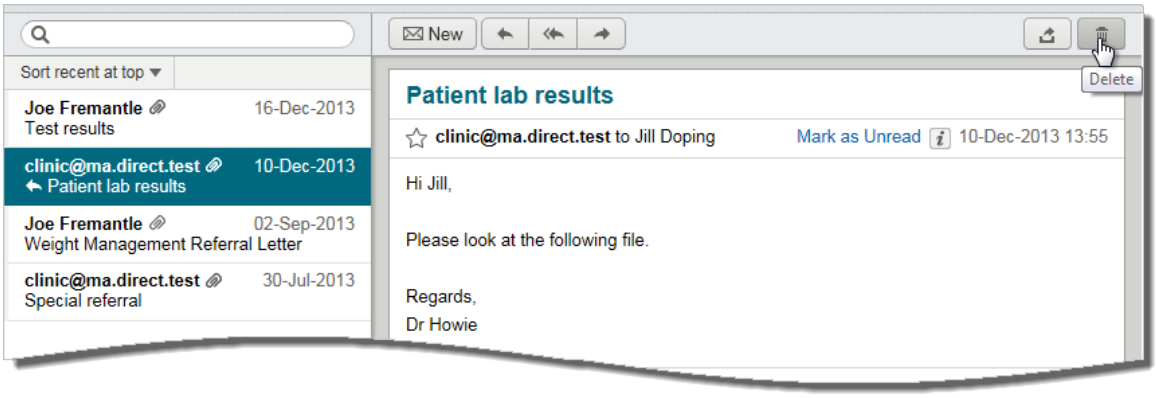
Deleting Messages

You may delete a message at any point by selecting the message, then the **Delete** button as shown in the following screenshot:



The message is then moved into the **Trash** folder.

> If you delete a Draft Message, the message will be permanently removed and will not be moved into the **Trash** folder.

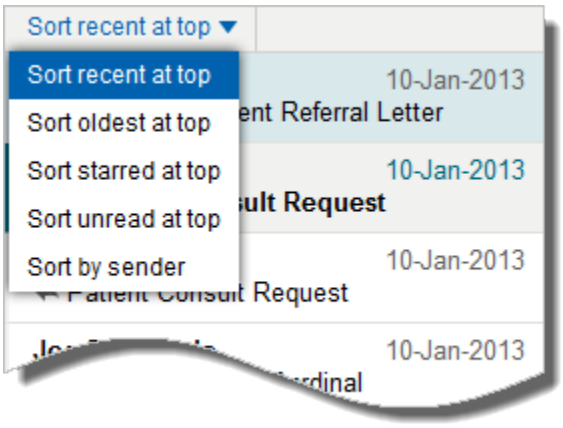
Viewing Deleted Messages

Deleted messages are stored in the **Trash** folder. To view a deleted message:

1. Select the **Trash** folder. The **Trash** folder displays.
2. Select a deleted message to display it in the right pane.

Sorting Deleted Messages

By default, messages display in descending date order. You can change the sort order of your messages by selecting the **Sort** option as shown in the following screenshot:



The following table lists the sort options that you can choose from, along with an explanation of the functionality of each sort option:

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Sort Option	Description
Sort recent at top	Select this option to view the latest message at the top of the list.
Sort oldest at top	Select this option to view the oldest message at the top of the list.
Sort starred at top	Select this option to view all starred messages at the top of the list.
Sort unread at top	Select this option to view all unread messages at the top of the list.
Sort by sender	Select this option to view all messages in alphabetical order according to the sender's first name.

Working with Deleted Messages

> Deleted messages cannot be restored to the inbox. They can be worked with from the **Trash** folder.

Even though a message has been deleted, you may still work with it. You may:

- Reply to the message by selecting the **Reply** button, or reply to all recipients by selecting the **Reply All** button.
- Forward the message to a new recipient by selecting the **Forward** button.
- Mark the message as unread by selecting the **Mark as Unread** link.
- Mark the message as important by selecting the star icon. Refer to Starring Messages for details.
- View more information about the message by selecting the **Message Details** icon .

Emptying the Trash Folder

Messages remain in the **Trash** folder until you choose to erase the messages. Messages can only be deleted individually. To do so:

1. Navigate to the **Trash** folder, as described in Viewing Deleted Messages.
2. Select a message and select the **Delete** button. The message is deleted.

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Searching for a Message

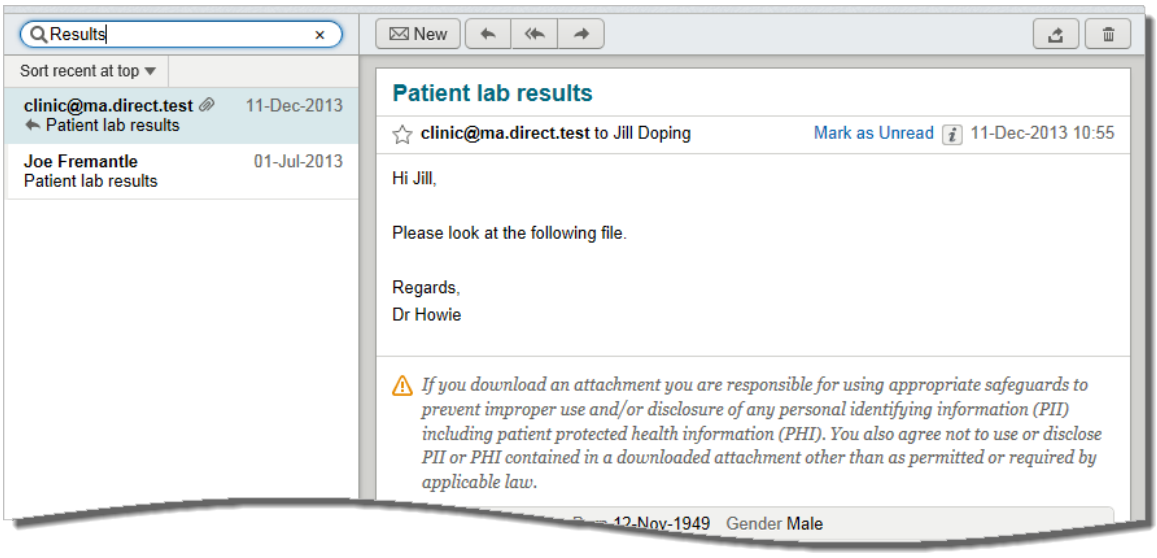
You can filter the messages in the various folders by *email address* and *message subject*. When filtering by email address, the following logic is applied:

- Messages in the **Inbox** are filtered by the **From** address.
- Messages in the **Drafts** and **Sent** folders are filtered by the **To** and **Cc** addresses.
- Messages in the **Trash** are filtered by the **To**, **Cc**, and **From** addresses.

All punctuation is ignored, apart from single quotation marks. For example, `bob's` and `john's CCD` are both valid search terms.

To search for a message:

1. In the **Search <folder>** field, enter the term or a part of the term you want to filter for. DSM Web looks up the email address and subject of each message, and only displays the messages that match the string you entered.


Results
New
Sort recent at top
clinic@ma.direct.test
Patient lab results
11-Dec-2013
Joe Fremantle
Patient lab results
01-Jul-2013
Patient lab results
clinic@ma.direct.test to Jill Doping
Mark as Unread
11-Dec-2013 10:55
Hi Jill,
Please look at the following file.
Regards,
Dr Howie
If you download an attachment you are responsible for using appropriate safeguards to prevent improper use and/or disclosure of any personal identifying information (PII) including patient protected health information (PHI). You also agree not to use or disclose PII or PHI contained in a downloaded attachment other than as permitted or required by applicable law.
12-Nov-1949
Gender Male

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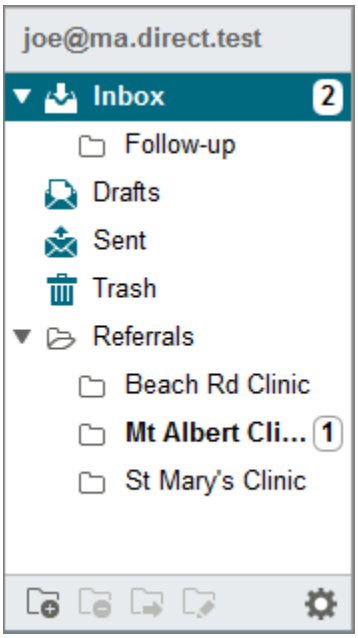
Managing Folders

Folders enable you to manage your mailbox and organize messages so you can find them easily. There are two types of folders:

- System Folders - Inbox, Drafts, Sent, and Trash. System folders cannot be moved, renamed, or deleted.
- User-defined Folders - Folders you have created to organize your mail.

System Folders

The system folders are Inbox, Drafts, Sent, and Trash. You cannot move, rename, or delete these folders. System folders are always displayed at the top of the list of folders, followed by any folders you create.



- **Inbox** - New mail arrives in the inbox when you first receive them. The **Inbox** is displayed by default when you log in to DSM Web. Refer to Receiving New Messages for details.
- **Drafts** - Draft messages are messages which have been composed, but have not been sent. Any type of message can be saved as a draft, whether it is a New, Forward, Reply, or Reply All message. Refer to Working with Draft Messages for details.
- **Sent** - The **Sent** folder contains copies of all messages you have sent. Refer to Sent Messages for details.
- **Trash** - Deleted items are placed in the **Trash** folder and remain there until you manually delete the message (in the **Trash**). The message is then permanently deleted and cannot be restored.

User-defined Folders

DSM Web enables you to create folders to organize your mail. Folders you create are displayed below the system folders, in the list of folders. Folder names must be unique at each level.

> Folder names are not case sensitive, meaning *Patient* and *patient* are considered the same name.

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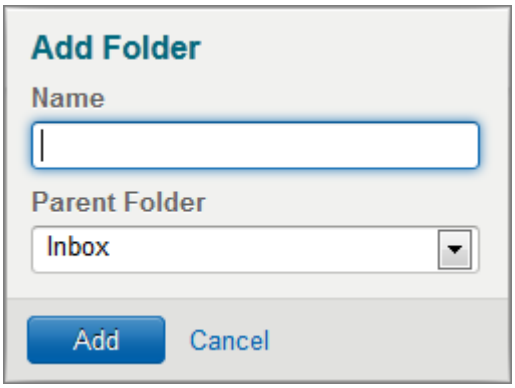
Creating a folder

In addition to the system folders (**Inbox**, **Drafts**, **Sent**, and **Trash**), you can create custom folders to store your mail messages.

To create a new folder:

1. Select the **Add Folder** icon at the bottom of the screen. The **Add Folder** screen is displayed.



2. Type a name for the folder.
3. Select the parent folder for the new folder.

> You cannot create two folders with the same name within the same parent folder. For example, you cannot have two folders named *Patients* in your **Inbox** folder, but you can have one folder named *Patients* in your **Inbox** folder, and another one with the same name in the **Sent** folder.

4. Select the **Add** button.

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Deleting a Folder

DSM Web enables you to delete custom folders you have created. You cannot delete system folders (**Inbox**, **Sent**, **Draft**, and **Trash**).

To delete a folder:

1. Select the folder in the list of folders.
2. Select the **Delete** icon:
    a. If there is mail in the folder, a warning message is displayed.
        - Select **Confirm** to delete the folder and all mail in the folder.
        - Select **Cancel** to cancel the action.
    b. If there is no mail in the folder (you are deleting an empty folder), DSM Web deletes the folder.

- When you delete a folder, its contents are moved to the Trash. You can recover contents from the Trash moving them to another folder.
- If there are messages in the folder that you want to save, move them to another folder.

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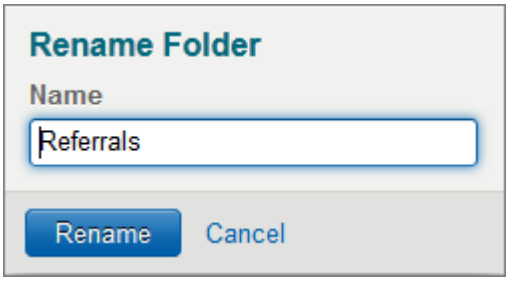
Renaming a Folder

To rename a folder:

1. Select the folder in the list of folders.
2. Select the **Rename** icon. The **Rename** dialog is displayed.



3. Enter a new name for the folder and select the **Rename** button.

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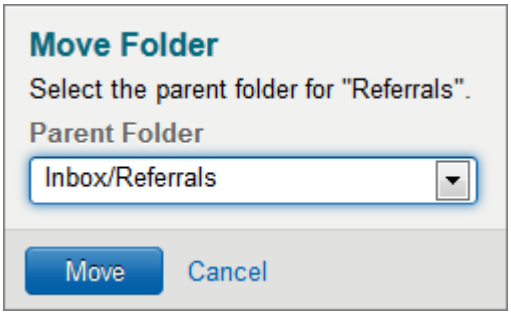
Moving a Folder

To move a folder:

1. Select the folder you want to move.
2. Select the **Move** icon. The **Move** dialog is displayed.



3. Select the new location for the folder and select the **Save** button.

- You cannot move a folder if a folder with the same name already exists in that location.
- The folder is moved to the specified destination, and all messages within the folder stay within the folder (that is, they are moved to the new location).

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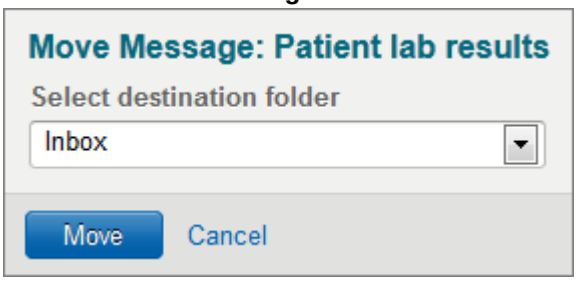
Moving Messages Between Folders

DSM Web enables you to move messages from one folder to another.

To move a message:

1. Open the message you want to move.
2. Select the **Move Message** icon. The **Move Message** dialog is displayed.



3. Select the folder you want to move the message to.
4. Select the **Move** button.

> You can move messages between folders as follow:
> - Received messages in **Inbox**, **Trash**, and custom folders can be moved to any folder except the **Sent** or **Drafts** folder.
> - Messages in **Sent** and **Drafts** can be moved to the **Trash**.

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Managing your Mailbox

DSM Web enables you to create message rules, contact groups, and configure an out of office auto-reply to manage your mailbox.

> These features must be configured by the DSM administrator before they are available to users.

- Configuring Out of Office Auto-Reply
- Maintaining Message Rules
- Maintaining Contact Groups

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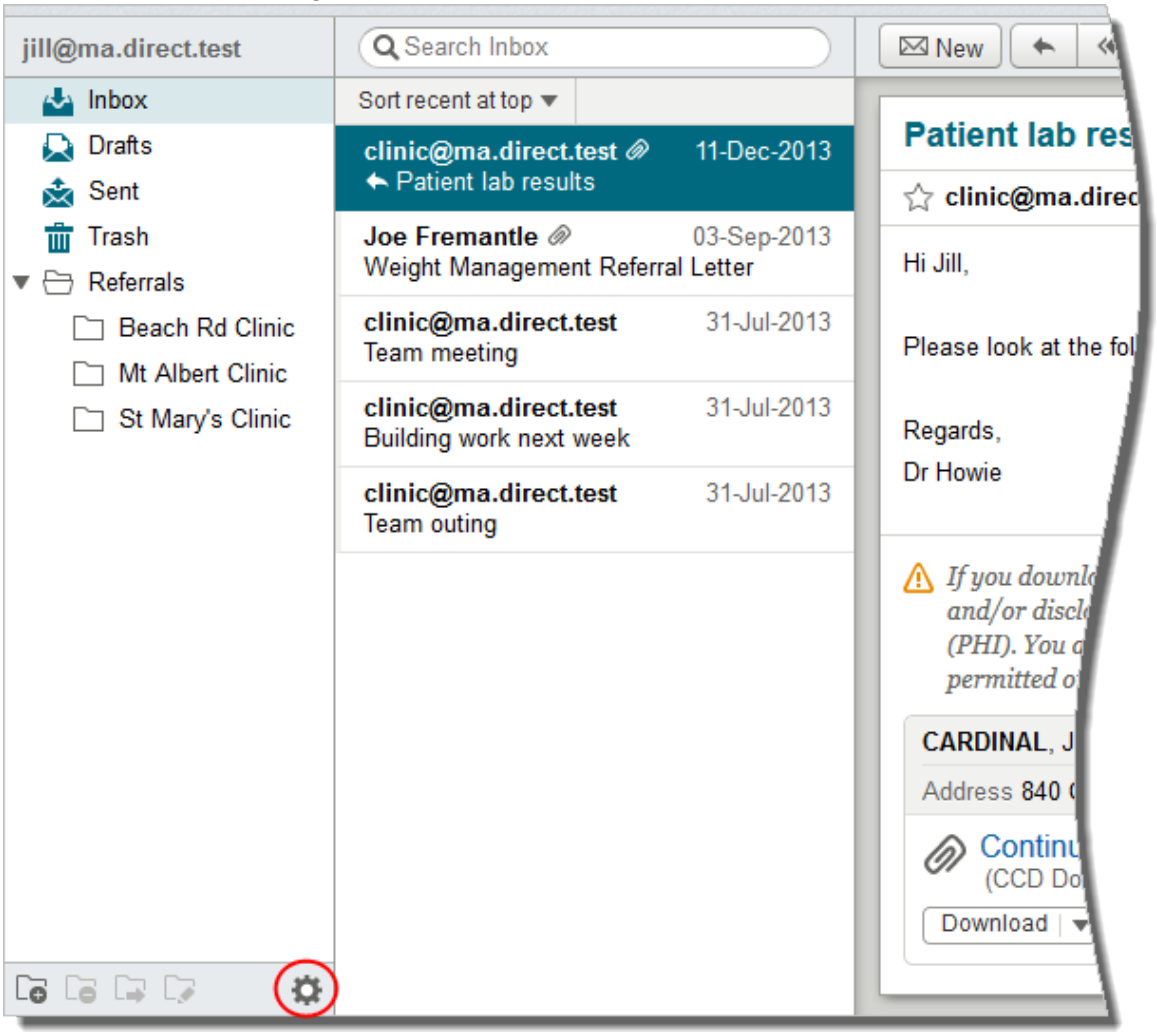
Configuring Out of Office Auto-Reply

DSM Web enables you to configure an out of office or automatic reply to respond to people who send you an email message. This helps inform people that you are not in the office or that your response might be delayed. Automatic Replies can include details, such as alternate contact information.

To enable an auto-reply (out of office):

1. Select the **Mailbox Settings** icon at the bottom of the list of folders.



2. The **Mailbox Settings** screen is displayed.

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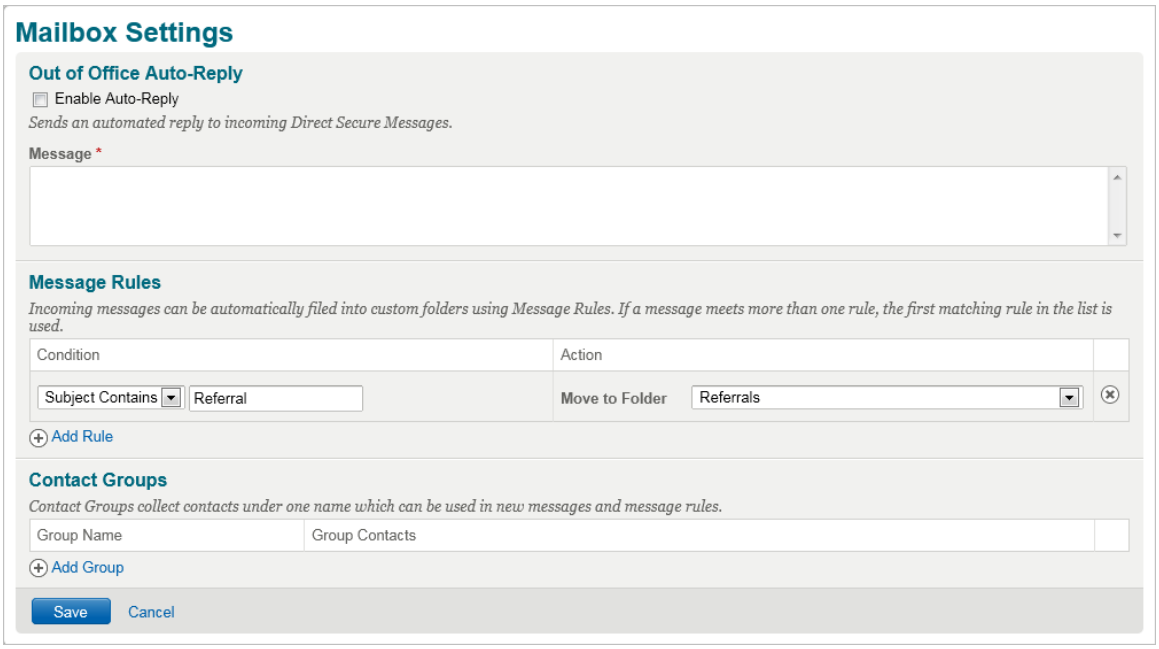
Mailbox Settings
Out of Office Auto-Reply
Enable Auto-Reply
Sends an automated reply to incoming Direct Secure Messages.
Message *
Message Rules
Incoming messages can be automatically filed into custom folders using Message Rules. If a message meets more than one rule, the first matching rule in the list is used.
Condition
Action
Subject Contains
Referral
Move to Folder
Referrals
Add Rule
Contact Groups
Contact Groups collect contacts under one name which can be used in new messages and message rules.
Group Name
Group Contacts
Add Group
Save
Cancel

3. Select the **Enable Auto-Reply** field, to enable the out of office auto-reply.
4. Enter the message to be sent when you receive a message.
5. Select the **Save** button.

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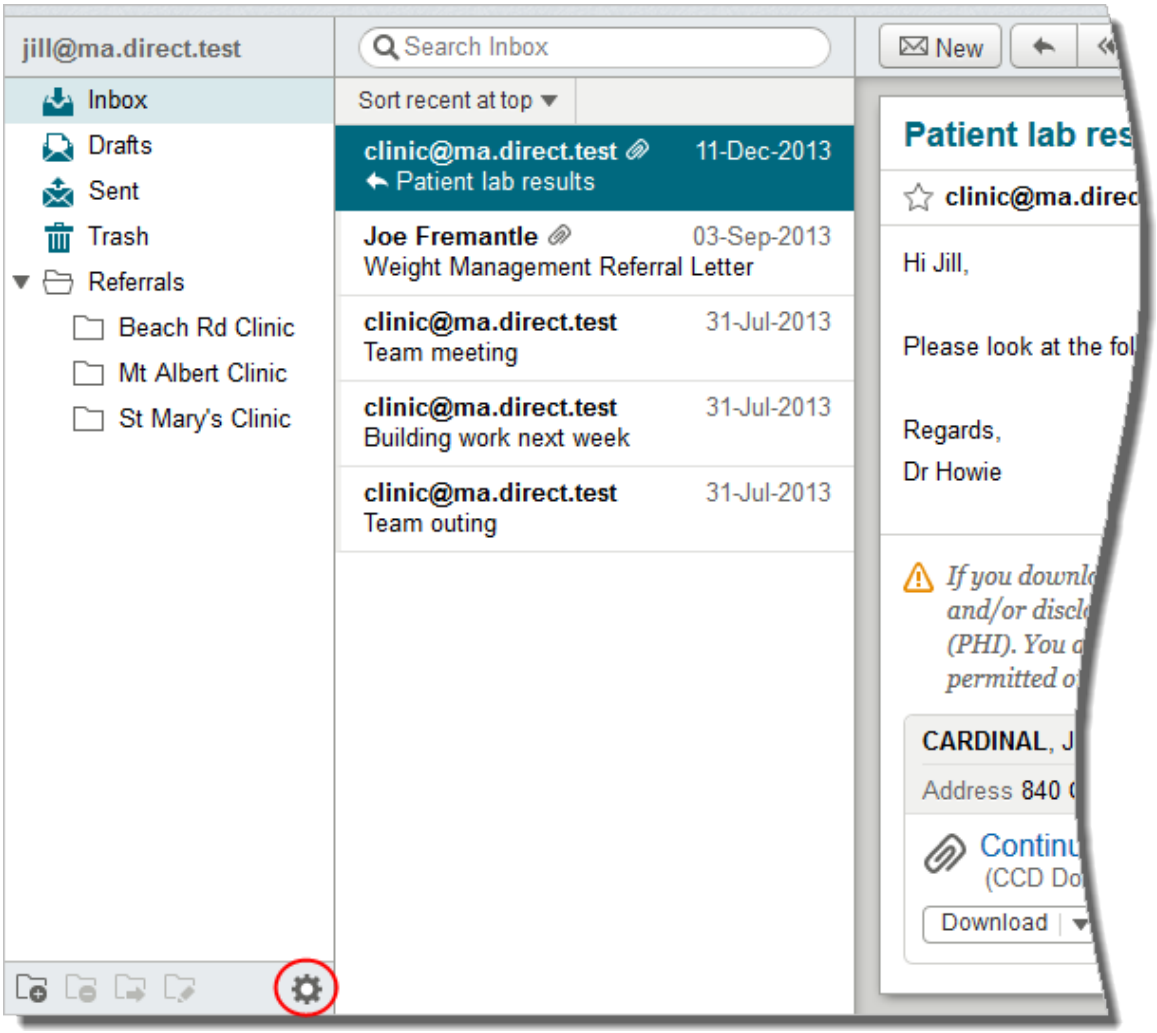
Maintaining Message Rules

DSM Web enables you to create rules to automatically filter incoming messages into a custom folder. For example, all messages with *Referrals* in the subject should be moved to the **Referrals** folder. Rules can be created based on message Subject or the sender of the message (From).

> Messages can be automatically filed into the Inbox, any custom folders, and the Trash folders. Messages cannot be automatically filed into the Sent or Drafts folders, or any subfolders of the Trash folder.

To configure a message rule:

1. Select the **Mailbox Settings** icon at the bottom of the list of folders.



2. The **Mailbox Settings** screen is displayed.

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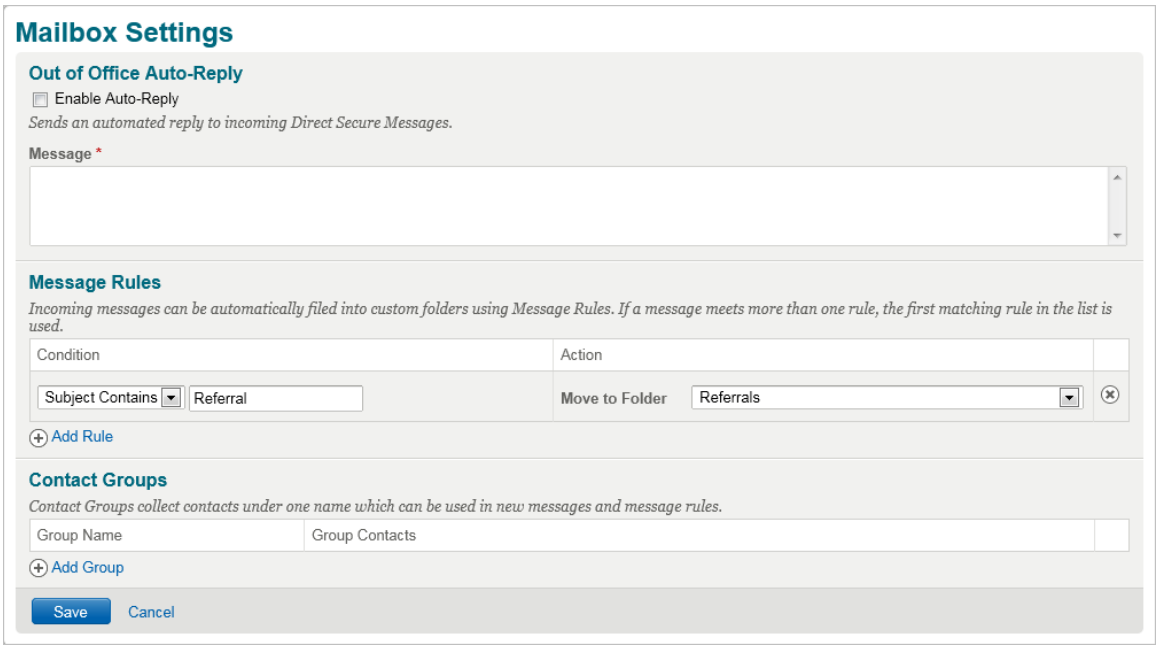
Mailbox Settings
Out of Office Auto-Reply
Enable Auto-Reply
Sends an automated reply to incoming Direct Secure Messages.
Message *
Message Rules
Incoming messages can be automatically filed into custom folders using Message Rules. If a message meets more than one rule, the first matching rule in the list is used.
Condition
Action
Subject Contains
Referral
Move to Folder
Referrals
Add Rule
Contact Groups
Contact Groups collect contacts under one name which can be used in new messages and message rules.
Group Name
Group Contacts
Add Group
Save
Cancel

3. In the **Message Rules** panel, configure message delivery rules as required. Refer to Configuring Message Rules for details.
4. Select the **Save** button to save your changes.

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Configuring Message Rules

To add a rule:

1. Select the **Add Rule** link.
2. Define the condition:

Condition	Description
Subject Contains	Enter the subject to filter on. For example, filter messages that have the word *Referral* in the subject. *test* will return Test and Tests.
From	Enter the email address of the sender. For example, filter messages from *admin@<emailaddress>.com*.

3. Define the action to take when a message meets a condition. For example, in the **Move to Folder** field, select the folder to file the message into when the condition matches.

- Multiple rules can be defined for a mailbox.
- Rules are run in the order they are defined in the **Message Rules** settings. If there is more than one condition that matches an incoming message, only the first rule in the list is executed.
- If there is rule where a condition matches but the folder to file the message into has been changed (deleted, moved, renamed), then the message will be filed (left) in the Inbox.

To delete a rule:

1. Select the **Delete** icon for the row of the rule that you want to delete.

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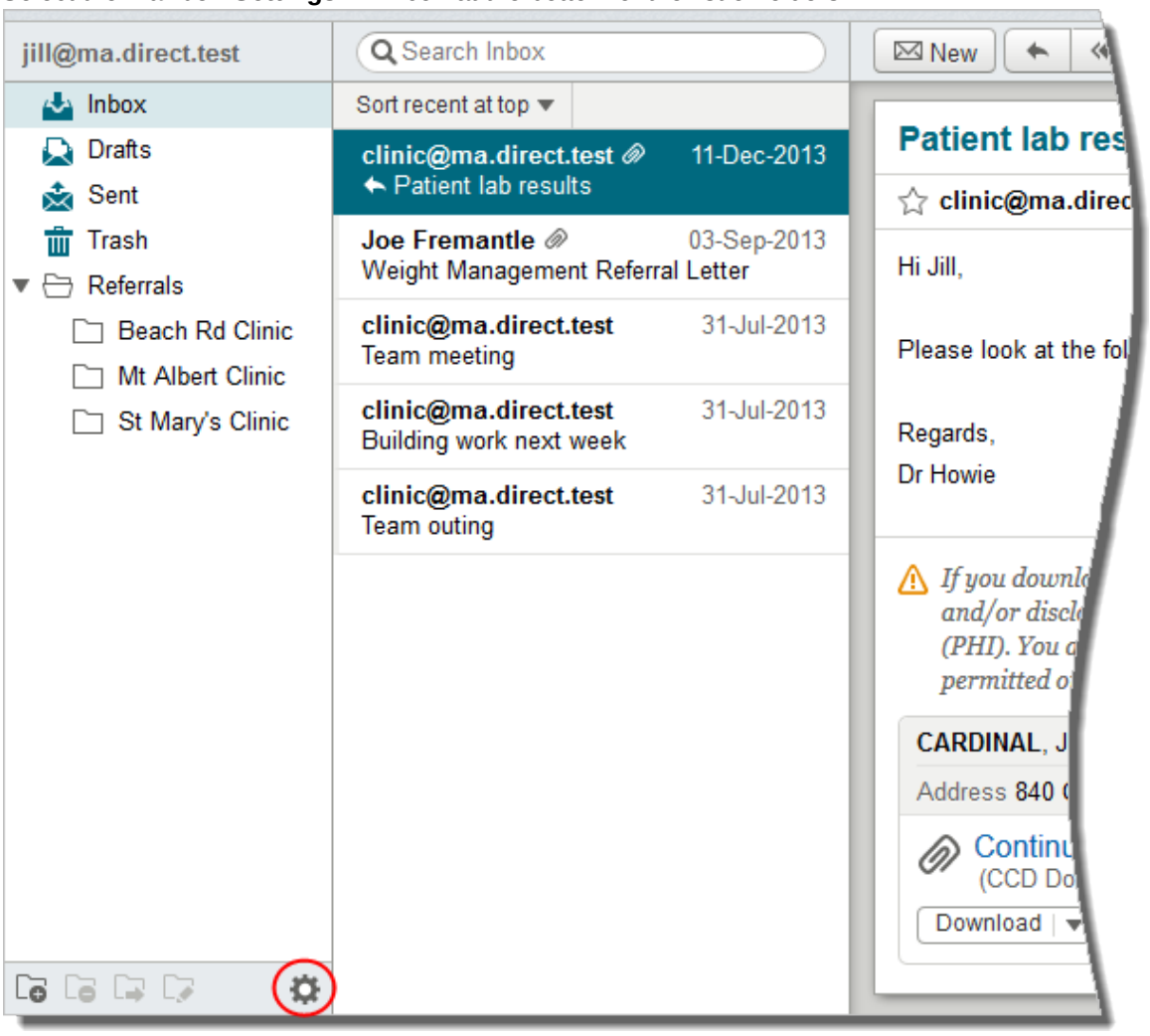
Maintaining Contact Groups

A contact group enables you to maintain a list of email addresses, providing an easy way to send an email message to everyone in the group at once, by addressing the email to the contact group. For example, if you frequently send messages to a group of people for referrals, you can create a contact group that contains the email addresses of everyone you send referrals messages to. A message sent to this distribution list goes to all recipients listed in the distribution list.

To view and maintain a contact group:

1. Select the **Mailbox Settings** icon at the bottom of the list of folders.



2. The **Mailbox Settings** screen is displayed.

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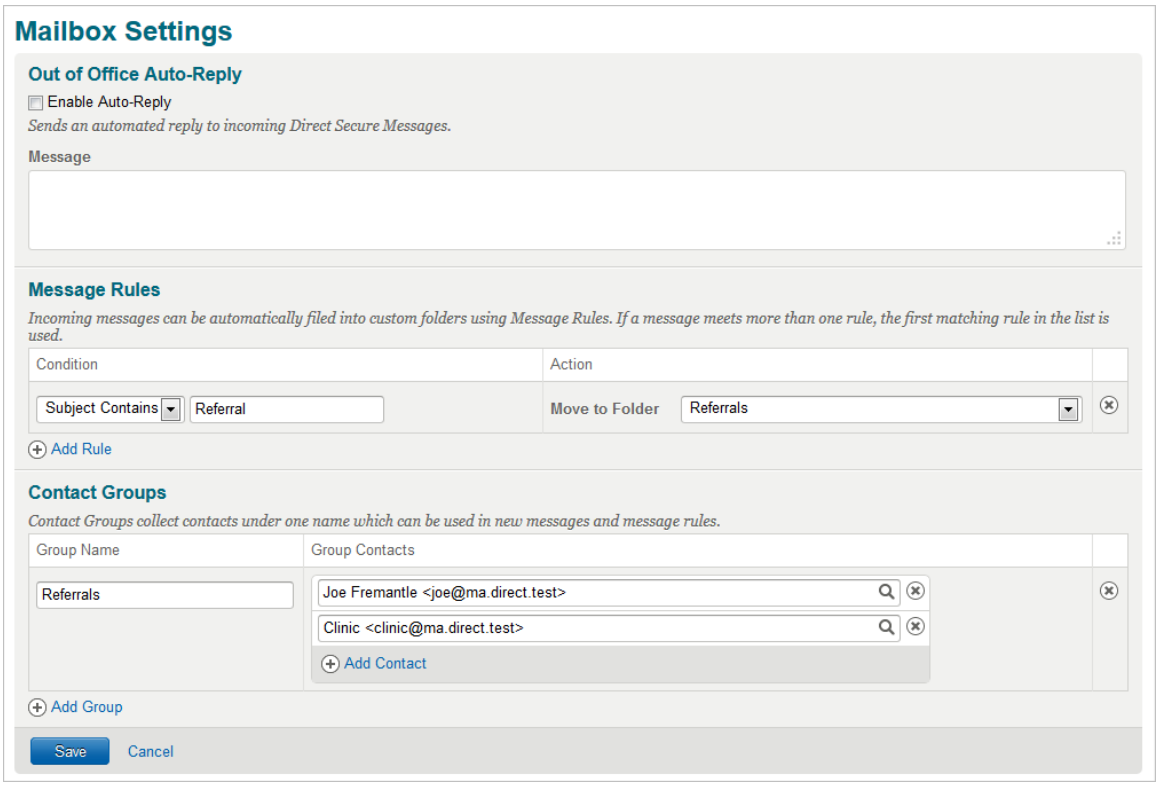

3. In the **Contact Groups** panel, configure your contact group as required. Refer to Configuring a Contact Group for details.
4. Select the **Save** button to save your changes.

Configuring a Contact Group

To add a contact group:

1. Select the **Add Group** link.
2. Define the group:
   - **Group Name** - enter the name for the contact group.
   - **Group Contacts** - enter the contact's email address. The email addresses of providers from the Provider Directory will already be loaded into the system. Start typing their name, and the auto-complete functionality will provide a drop-down list with matches. Select the contact's name from the list. To add another contact to the contact group, select the **Add Contact** link.
3. Select the **Save** button.

- You can create and manage your own personal contact groups, but cannot see the contact groups another user has created.
- Contact groups are associated with a mail account, therefore, for Shared Mailboxes, all authorized users can view and maintain contact groups set up for the shared mailbox.

To add a contact to a group:

1. Select the group in the **Contact Groups** panel.
2. In the **Group Contacts** field, select the **Add Contact** link to add an email address line.
3. In the **Email** field, enter the contact's email address. The email addresses of providers from the Provider Directory will already be loaded into the system. Start typing their name, and the auto-complete functionality will provide a drop-down list with matches. Select the recipient's name from the list.
4. Select the **Save** button.

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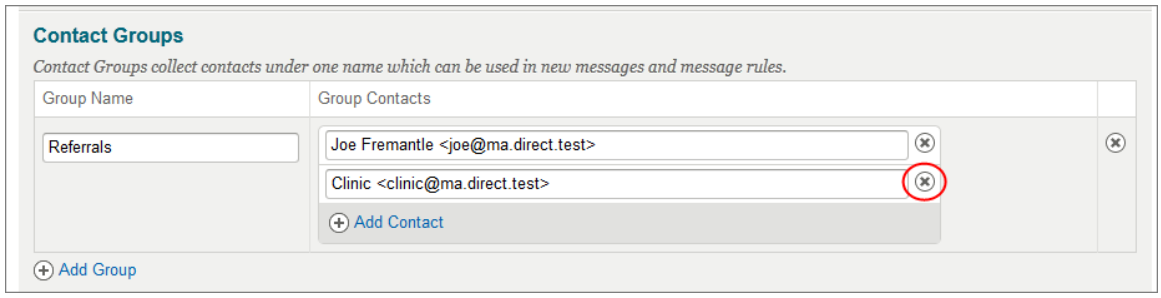
To delete a contact from the group:

1. Select the group in the **Contact Groups** panel.
2. Select the **Delete** icon for the contact.

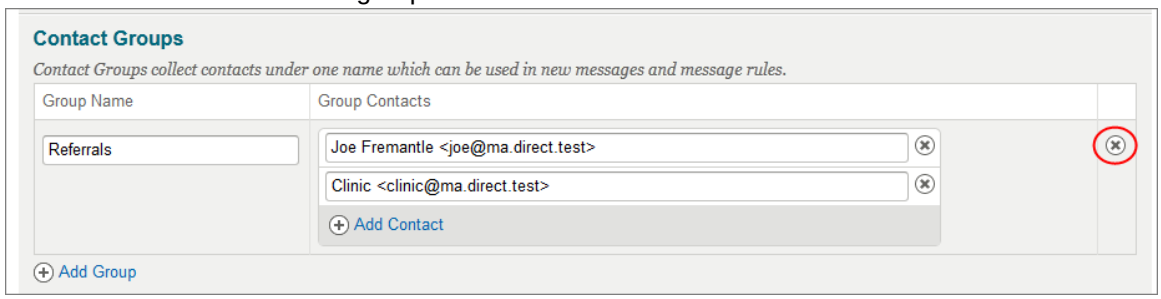


> This will delete the contact from the group, but not the actual contact. The contact will remain in your Contacts list.

3. Select the **Save** button.

To delete a contact group:

1. Select the group in the **Contact Groups** panel.
2. Select the **Delete** icon for the group.



> This will delete the contact group, but not the actual contacts. The contacts will remain in your Contacts list.

3. Select the **Save** button.

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Message Disposition Notifications (Delivery Receipts)

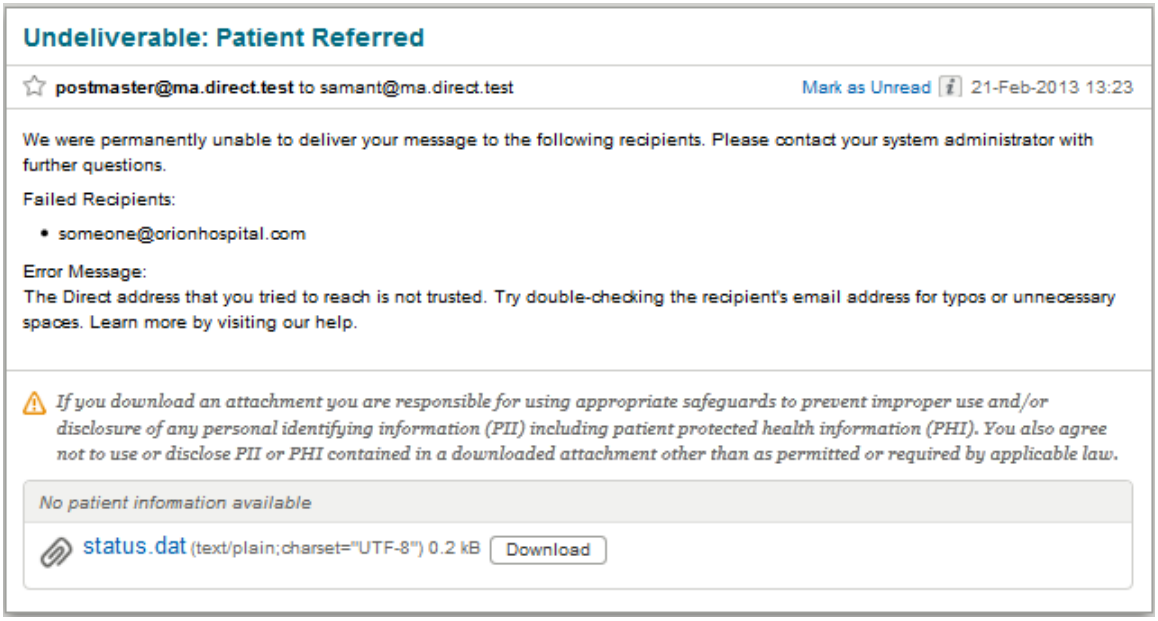
Message Disposition Notifications (MDNs) or Delivery Receipts are sent between a sender's system and recipient's system to indicate if mail delivery has been successful or if delivery has failed. Notification messages indicate the disposition of a Direct message (for example, processed, successfully delivered, unsuccessfully delivered).

DSM Web displays only Delivery Failure Notifications. Success notifications (both processed and successful delivery notifications) are not displayed in the interface.

If delivery has failed, the MDNs trigger a Delivery Status Notification (DSN), to indicate delivery has failed to one or more recipients. Delivery Failure Notifications may be generated for any of the following reasons:

- Message has been rejected
- Delivery has failed
- Delivery cannot be confirmed

The following screenshot shows an example of a message rejection or a delivery failure.


Undeliverable: Patient Referred
postmaster@ma.direct.test to samant@ma.direct.test
Mark as Unread
21-Feb-2013 13:23
We were permanently unable to deliver your message to the following recipients. Please contact your system administrator with further questions.
Failed Recipients:
someone@orionhospital.com
Error Message:
The Direct address that you tried to reach is not trusted. Try double-checking the recipient's email address for typos or unnecessary spaces. Learn more by visiting our help.
If you download an attachment you are responsible for using appropriate safeguards to prevent improper use and/or disclosure of any personal identifying information (PII) including patient protected health information (PHI). You also agree not to use or disclose PII or PHI contained in a downloaded attachment other than as permitted or required by applicable law.
No patient information available
status.dat (text/plain;charset="UTF-8") 0.2 kB
Download

The following screenshot shows an example where delivery cannot be confirmed.

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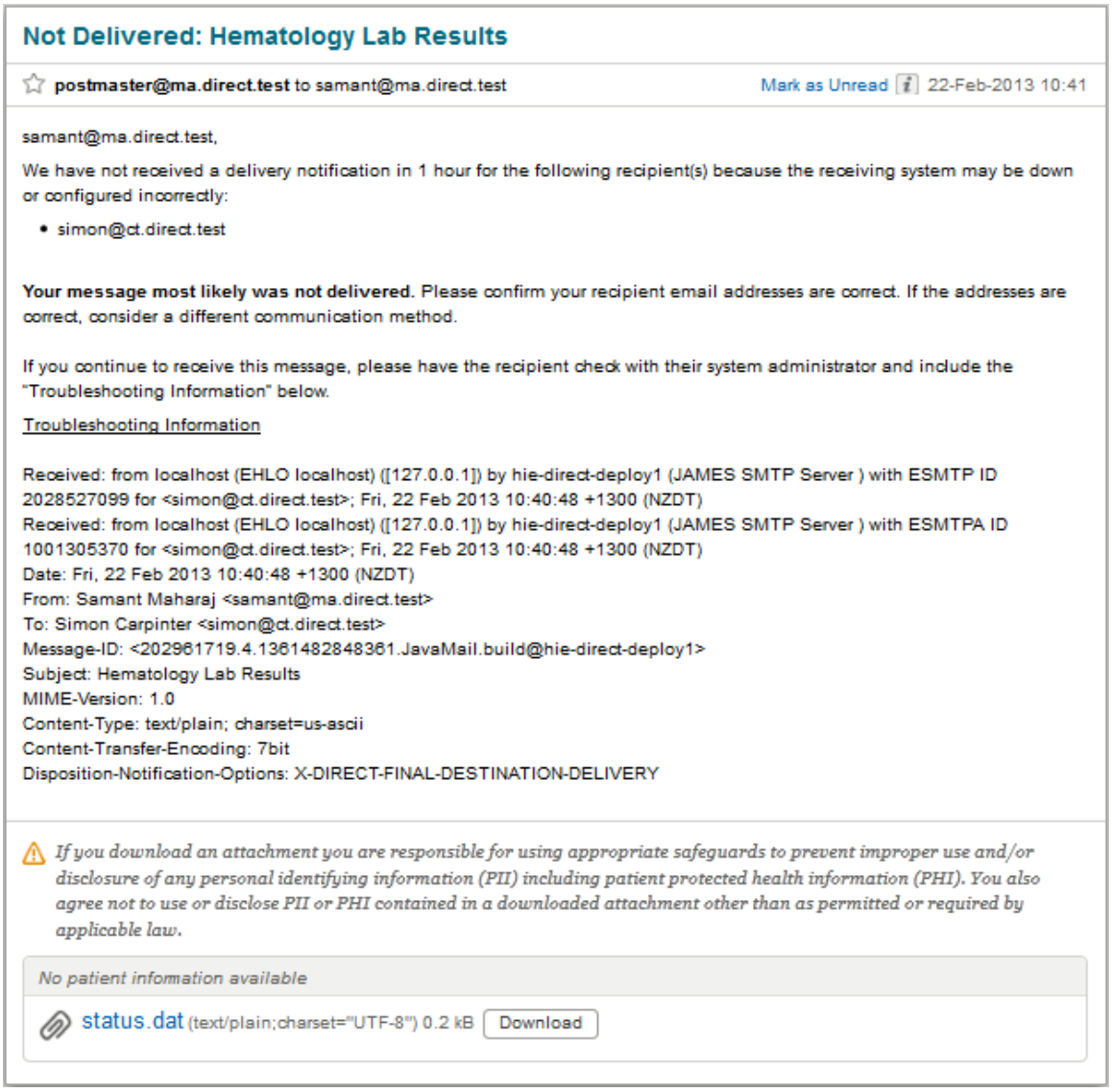

Not Delivered: Hematology Lab Results

postmaster@ma.direct.test to samant@ma.direct.test — Mark as Unread — 22-Feb-2013 10:41

samant@ma.direct.test,

We have not received a delivery notification in 1 hour for the following recipient(s) because the receiving system may be down or configured incorrectly:

- simon@ct.direct.test

Your message most likely was not delivered. Please confirm your recipient email addresses are correct. If the addresses are correct, consider a different communication method.

If you continue to receive this message, please have the recipient check with their system administrator and include the "Troubleshooting Information" below.

Troubleshooting Information

Received: from localhost (EHLO localhost) ([127.0.0.1]) by hie-direct-deploy1 (JAMES SMTP Server) with ESMTP ID 2028527099 for <simon@ct.direct.test>; Fri, 22 Feb 2013 10:40:48 +1300 (NZDT)
Received: from localhost (EHLO localhost) ([127.0.0.1]) by hie-direct-deploy1 (JAMES SMTP Server) with ESMTPA ID 1001305370 for <simon@ct.direct.test>; Fri, 22 Feb 2013 10:40:48 +1300 (NZDT)
Date: Fri, 22 Feb 2013 10:40:48 +1300 (NZDT)
From: Samant Maharaj <samant@ma.direct.test>
To: Simon Carpinter <simon@ct.direct.test>
Message-ID: <202961719.4.1361482848361.JavaMail.build@hie-direct-deploy1>
Subject: Hematology Lab Results
MIME-Version: 1.0
Content-Type: text/plain; charset=us-ascii
Content-Transfer-Encoding: 7bit
Disposition-Notification-Options: X-DIRECT-FINAL-DESTINATION-DELIVERY

If you download an attachment you are responsible for using appropriate safeguards to prevent improper use and/or disclosure of any personal identifying information (PII) including patient protected health information (PHI). You also agree not to use or disclose PII or PHI contained in a downloaded attachment other than as permitted or required by applicable law.

No patient information available

status.dat (text/plain;charset="UTF-8") 0.2 kB Download

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Protected Health Information

Care must be taken to keep Protected Health Information (PHI) secure. Although DSM Web is secure, information on local systems may be accessed by unauthorized users if care is not taken. This may happen if:

- The system is left in an insecure state; for example, you do not log out of DSM Web when you have finished your session.
- Attachments or draft messages are left open for others to see.

To ensure PHI is not accessed by an unauthorized user:

- Always log out at the end of your session. To do so, select the **Logout** button. This closes all open drafts and attachments automatically.
- Always check all windows and tabs are closed before stepping away from your computer, as attachments and drafts may be open in new windows in your browser.
- Follow all security guidelines recommended by your system administrator.

Taking Care Not to Miss Vital Messages

When an email has been opened, it is automatically marked as read. There is a risk that a message may be selected accidentally, causing it to be marked as read. There is an automatic delay between messages being opened and being marked as read; additionally, you can manually mark a read message as unread.

If an email fails to send, a delivery failure notification message will be delivered to the sender. Depending on what caused the sending to fail, the delivery failure notification message may take an hour or more to arrive. This means that it may be some time before the sender is aware that the email failed to send. Therefore, it is recommended that urgent information is followed up in person.

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